Outlook 2013

Shelley Fishel

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Outlook 2013
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About Shelley Fishel

Shelley Fishel has more than a dozen years' experience in helping people to get more from their computers. After working for an IT training organization Shelley decided to 'do her own thing' when she realized the limitations of delivering standard courses.

"Why waste time and money on training people in areas that are not relevant to them? It's common sense to invest that time and effort on what they really need."

That was the 'light bulb moment' and the IT Training Surgery's unique approach has resulted in a growing business with a team of highly qualified IT trainers.

"If trainees get bored they forget most of what they learn. We like to offer a range of training approaches to suit different people and, most of all; we aim to make training fun!"

Shelley and her team have worked hard to achieve accreditation by the Learning and Performance Institute for the IT Training Surgery, as a recognized high quality provider of IT training,

To find out more about our training give us a call on 020 8203 1774 or visit our website www.theittrainingsurgery.com

About Outlook 2013

This user guide will enable you to save time when working in Outlook 2013.

You will learn how to:

- Create folders to keep your email tidy
- Use QuickSteps to do things such as filing or creating standard emails speedily
- Add appoinments – all day events and Scheduled Meetings
- Create Tasks
- Perform an email mail merge
- Shortcuts for working with email and calendar

1 Outlook 2013 Home Screen

1.1 The Ribbon

The Ribbon is present in Outlook 2010 and Outlook 2013 everywhere. All the tabs have tools arranged in groups and are organized logical.

1.1.1 The Home Ribbon

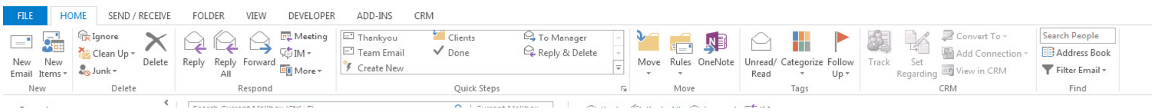


Figure 1 – The Home Ribbon

Here you will find all the tools you need to create and respond to email.

1.1.2 The Send Receive Ribbon

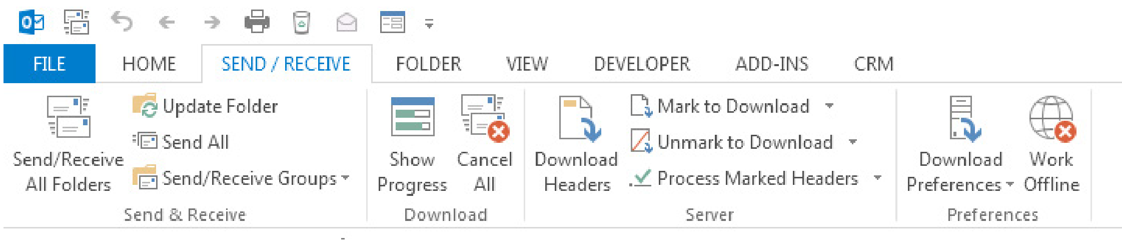


Figure 2 – The send receive Ribbon

The Send Receive Ribbon provides all the tools you need to send and receive emails.

1.1.3 The Folder Ribbon

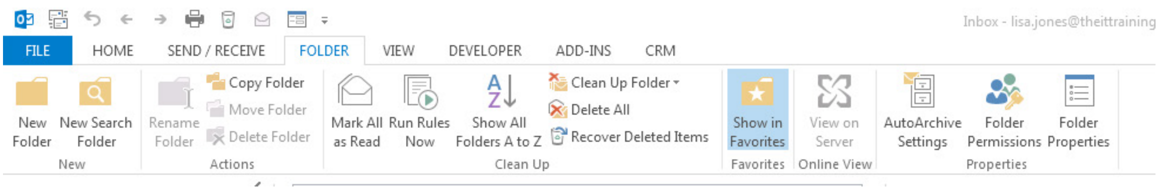


Figure 3 – The Folder Ribbon

Here you can create new folders and set up search folders and decide what to show in favourites.

1.1.4 The View Ribbon

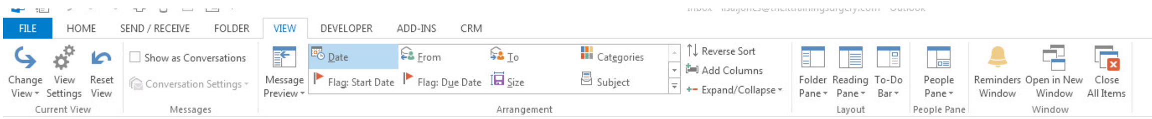


Figure 4 – The View Ribbon

On the View Ribbon you can change how the screen you are looking at is arranged. This ribbon will have different icons displayed depending on which part of Outlook you are currently using.

1.2 The Quick Access Toolbar

The Quick Access Toolbar is present across all of Microsoft Office and is a handy place to put your most frequently used icons. It lives at the top left of your screen.

Figure 5 – The Quick access Toolbar

You can customise it with the Icons that you use most frequently

1.2.1 Adding an icon to the Quick Access Toolbar

To add an icon click the drop down arrow and select the icon from the list.

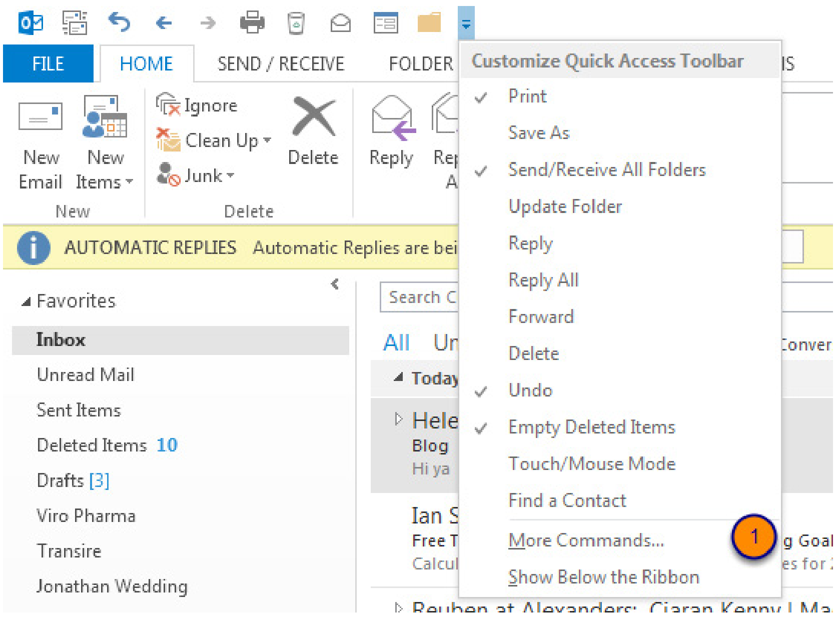


Figure 6 – add icons to the Quick Access Toolbar

If the icon you want is not on the list you can click More Commands (1)

1.2.2 More Commands

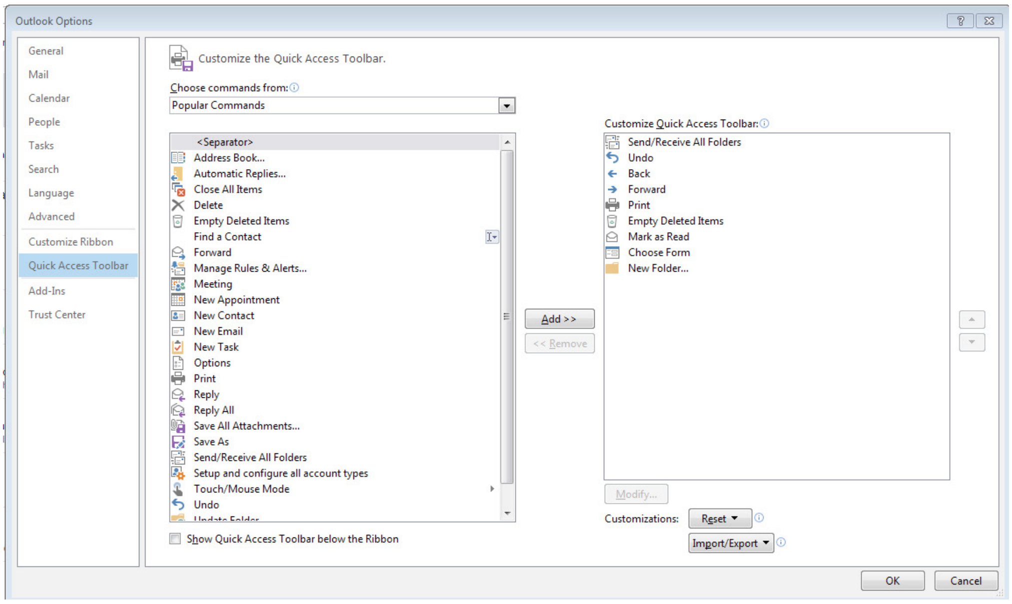


Figure 7 – add more commands

Here you can see the Popular Command list on the left and the ones on your Quick Access Toolbar on the right. Find the one you want on the left and either double click to make it jump across or click on it and then press the Add button.

Click OK when done

1.2.3 Right click to add an icon

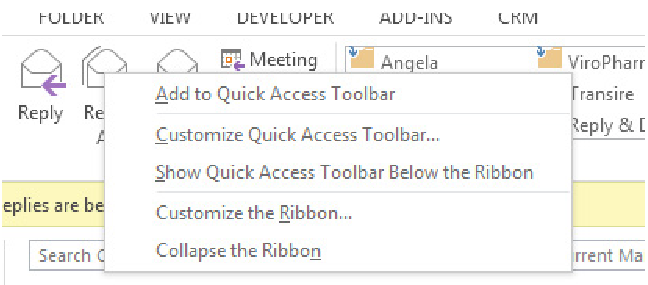


Figure 8 – right click

Right click then click on the icon you wish to add

1.3 The Alt Key

The Alt Key allows you to access visual keyboard shortcuts for navigating the ribbon or using the Quick Access Toolbar.

Press ALT on the keyboard.

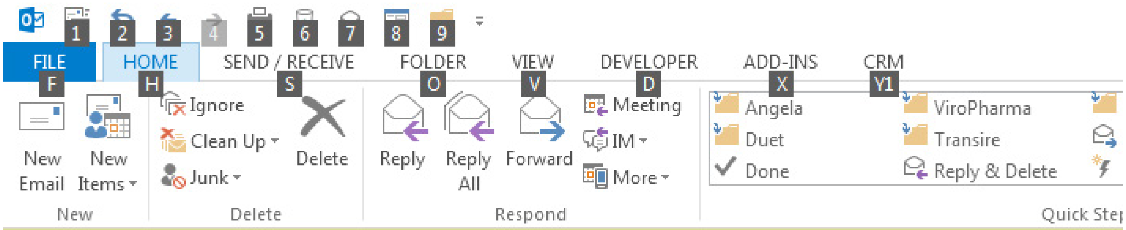


Figure 9 – The Alt Key

Press the letter or number to use the command.

1.4 Drag and drop between email and calendar

In Outlook you can drag and drop between the different parts of the software. It is a great time saver. For example drag an email on to the Calendar Icon to create an appointment with the detail from the email in the body. Drag an appointment to the Mail Icon to create an email with the detail of the appointment in the body.

1.4.1 Drag an email to the calendar

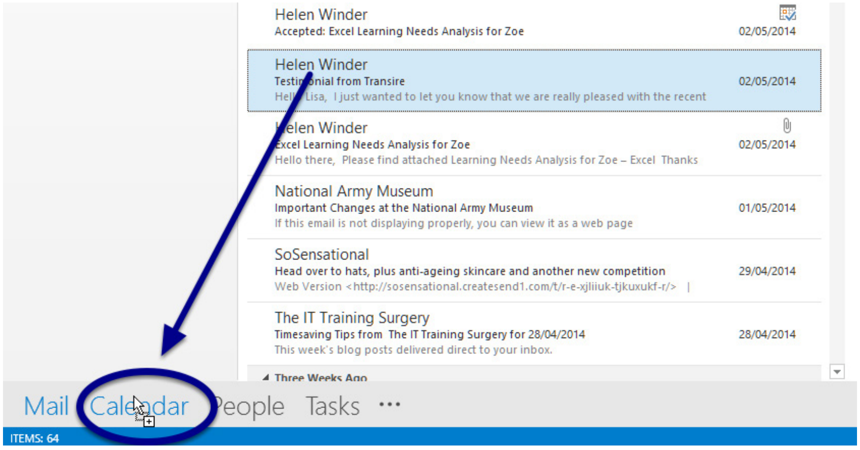


Figure 10 – drag email to calendar to create an appointment

Drag the email and drop it on the Calendar Shortcut

1.4.2 New appointment is created

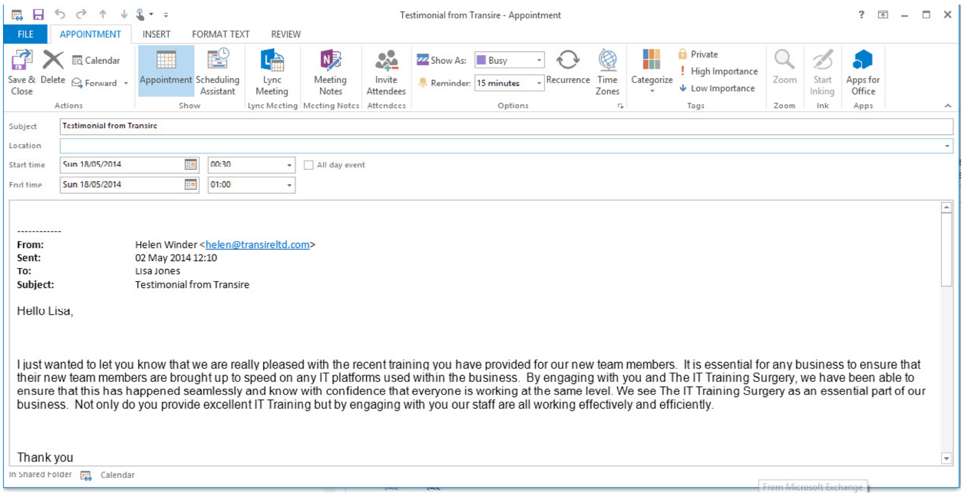


Figure 11 – New appointment is created

A new appointment is created ready for you to add the date and time.
When you have finished click Save and Close.

1.4.3 Drag a calendar appointment to mail

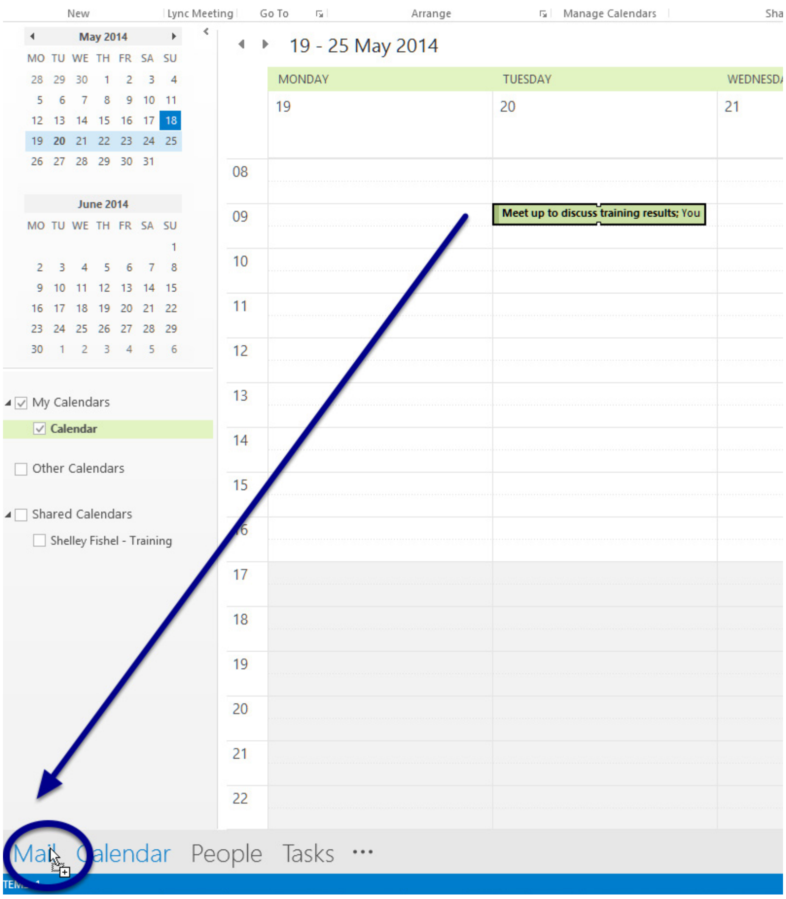


Figure 12 – drag appoinment to email to create an email with the details of the appointment

Drag an appointment from the calendar to the Mail Icon

1.4.4 New email created

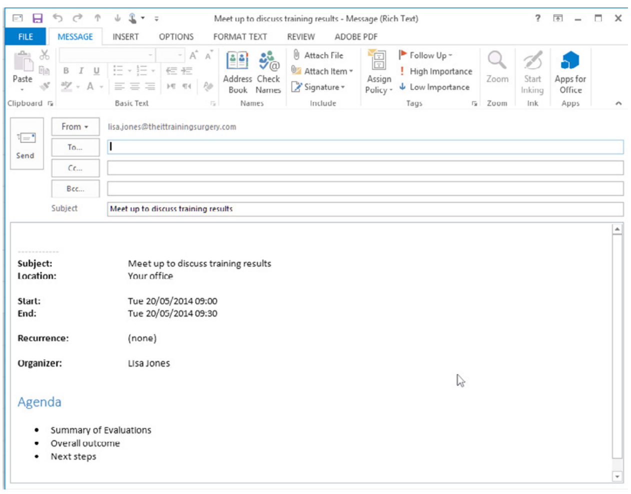


Figure 13 – new email created

A new email is created ready for you to address – you can add more detail to the body should you need to.

1.5 Sneak peek

Sneak peek is my own terminology. If you hover over the Calendar, People or Task Icons you get to peak into what is there. Handy for quick access to favourite people or to the day's agenda.

1.5.1 Hover over calendar

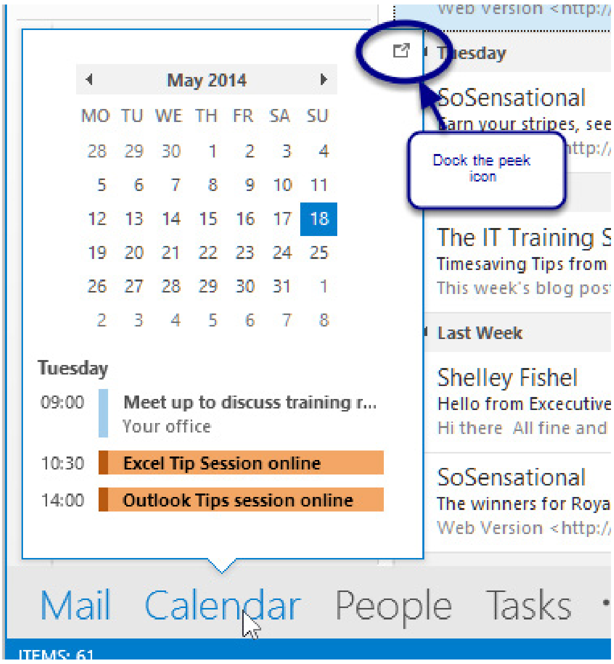


Figure 14 – Peek into the calendar

1. Hover the mouse over the Calendar Icon in the navigation pane
2. A preview of your upcoming appointments pops up with a month to view calendar
3. Click on any day in the calendar to see what is going on that day

Click the Dock the Peek Icon top right to dock the Peek view on the right of the screen in its own task pane.

1.5.2 Dock the peek

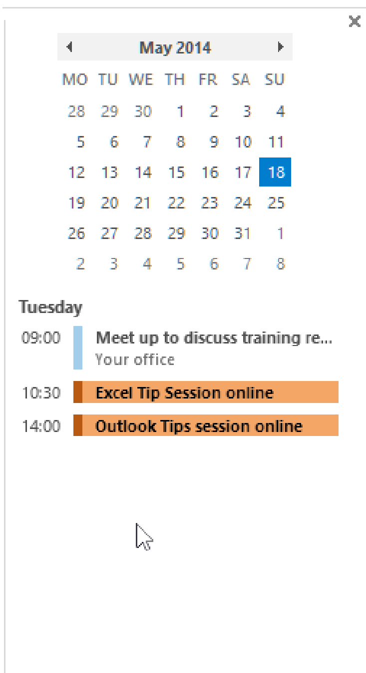


Figure 15 – dock the calnedar peek in the task pane.

The calendar in this case docks itself on the right in its own task pane.

1.5.3 Hover over people

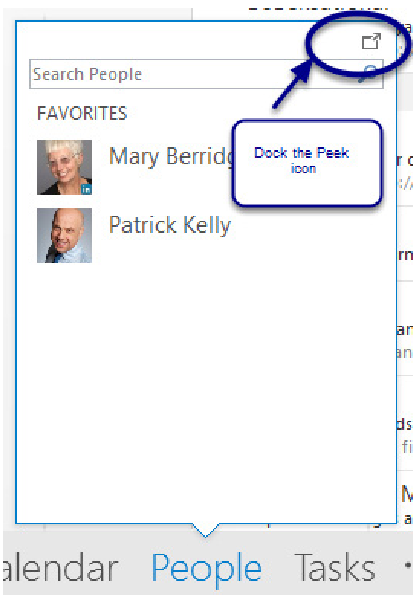


Figure 16 – peek at People

Hover the mouse over the People shortcut and get a list of favourite people. If the person you want is not in the list, you can search for them from the Search People box at the top.

You can also Dock the Peek on the Task Pane on the right of the screen by clicking on the Dock Peek Icon top right.

1.5.4 People docked`

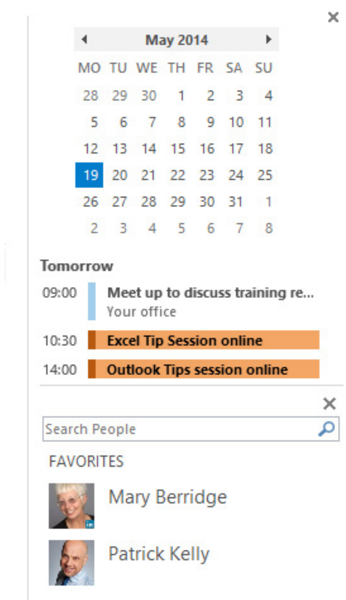


Figure 17 – dock the people peek in the task pane

As I had already docked the calendar – people are now directly underneath.

1.5.5 Hover over tasks

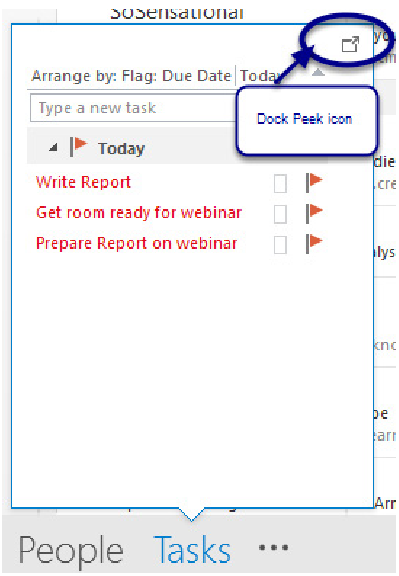


Figure 18 – have a peek at the tasks

Hover the mouse over the Tasks shortcut to see a list of upcoming tasks.

This too can be docked by clicking the Dock Peek Icon.

1.5.6 Tasks docked

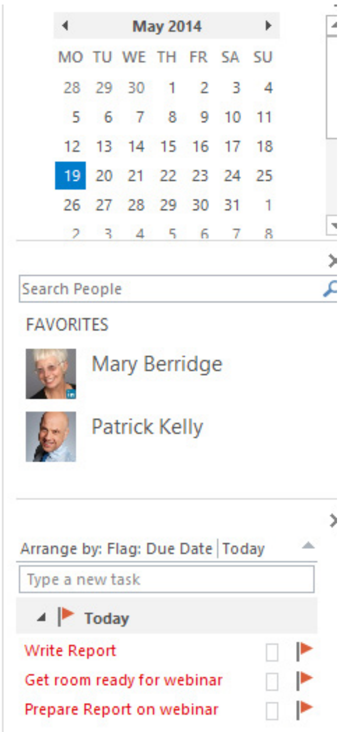


Figure 19 – dock tasks as well

Having docked the calendar and people Peeks first, Outlook puts the tasks at the bottom. However, the Peeks will appear in whichever order you dock them in.

2 Mail

2.1 Reply to an email

It is normal to reply to email and this should be done as efficiently as possible.

2.1.1 Reply from the Ribbon

Figure 20 – mail icons

Use Reply or Reply to All from the Ribbon.

2.1.2 Reply from the top of the email

Figure 21 – icons in the email header

Click the required option right from the top of the email header.

2.1.2 Reply using a right click

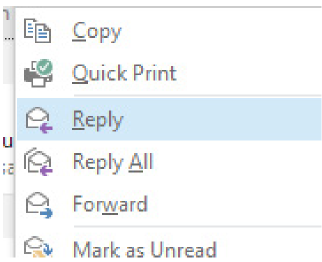


Figure 22 – right click to respond

Right click on the email you want to reply to and select the type of reply.

2.1.3 Reply or Reply to All

When an email is addressed only to you, it is a simple thing to hit reply and respond to the person sending the email. However, if you have been copied in to an email, you may have to think a little more carefully.

Do you want to reply to everyone or perhaps just to the person who sent the email.

If you want to reply to everyone, then use Reply to All. Otherwise just reply to the sender.

2.2 Pop out or discard

When you receive an email and wish to reply, the reply sits inside the Reading Pane. This allows you to type a quick response and send. However if you want to add extras to your email or get access to formatting options, you will need to Pop Out the email so that you can edit it in its own window.

If you decide that you don't like what you have written when responding in the Reading Pane you can discard your changes. Otherwise Outlook saves a draft of the message.

2.2.1 Pop out

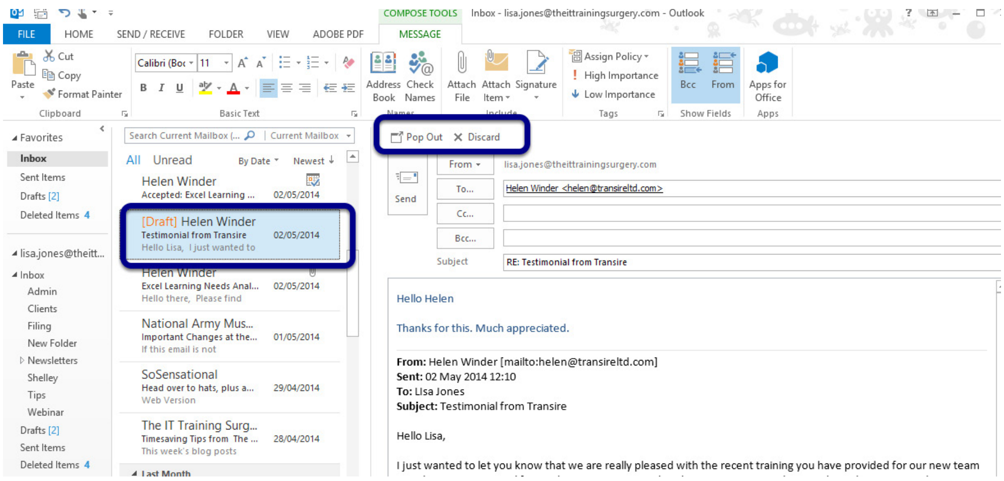


Figure 23 – pop out to edit with full capability

When you click on Reply the email opens up inside the Reading Pane. It starts a Draft message which you can see in the email list.

To get access to more tools click Pop Out.

2.2.2 Email popped out

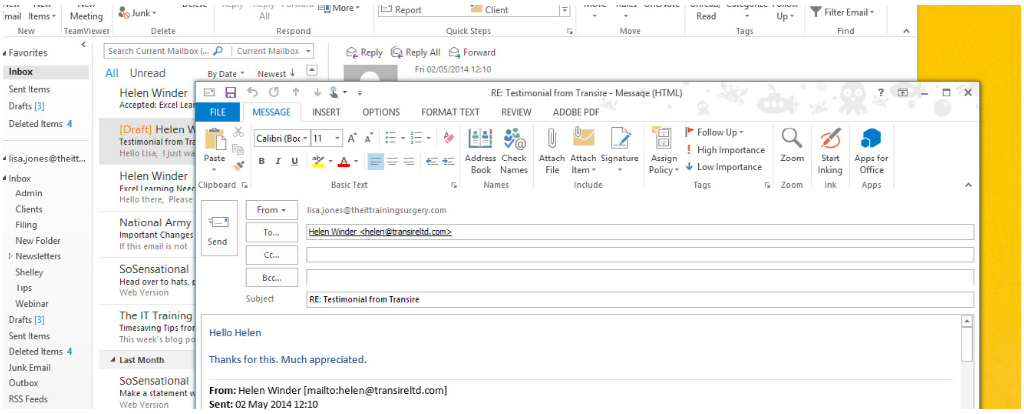


Figure 24 – full email editing

Here is the email above now open in its own window. Access to all the Ribbon tabs is now available and full editing can take place.

Finish off the email and click Send.

2.2.3 Discard

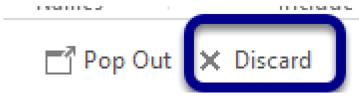


Figure 25 – don't like what you did, simply discard

If you start to make changes to the reply in the reading pane, and then decide that you don't want to keep them, click Discard and the reply is discarded.

2.3 Reply with meeting

Let me set the scene. Joe writes to you with a whole long screed and amongst it all is the need to get together and discuss the points raised. Normally you would go to your Calendar and start a meeting request to send to Joe. Now you can simply reply to his email with a meeting request!

2.3.1 Reply with meeting

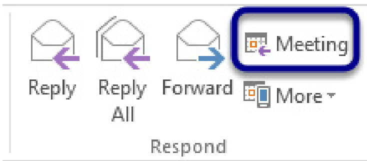


Figure 26 – reply with meeting icon

In the Respond Group on the ribbon click Meeting

2.3.2 Set up the meeting request

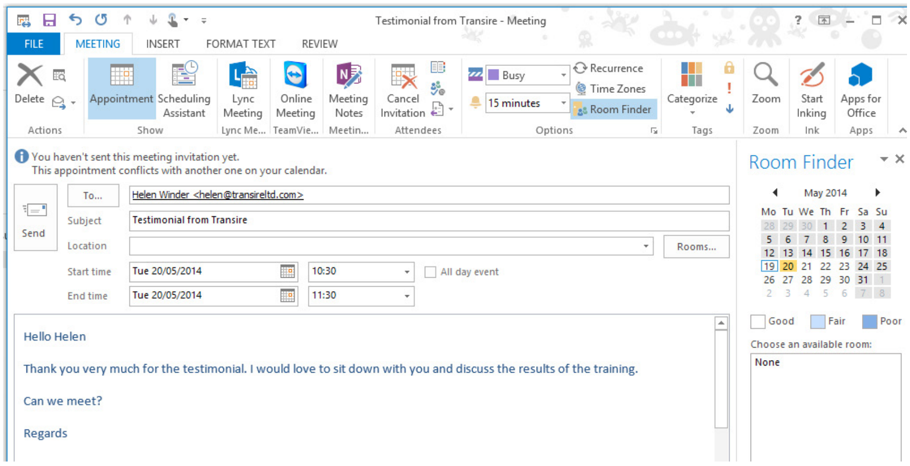


Figure 27 – create the meeting as normal

A meeting request is generated complete with the email address of the person who you are replying to and ready for you to add date and time to the meeting.

When you have completed it click Send.

2.4 Insert a copy of your calendar

Along similar lines as Reply with Meeting. Here is the scenario. In the example here, Shelley needs to have a meeting with Lisa. In order to make it easy for Lisa to choose a date and time for the meeting, Shelley sends Lisa an email with a copy of her calendar for the next day. Lisa can see when Shelley is free or busy and can respond accordingly.

2.4.1 Email with Calendar

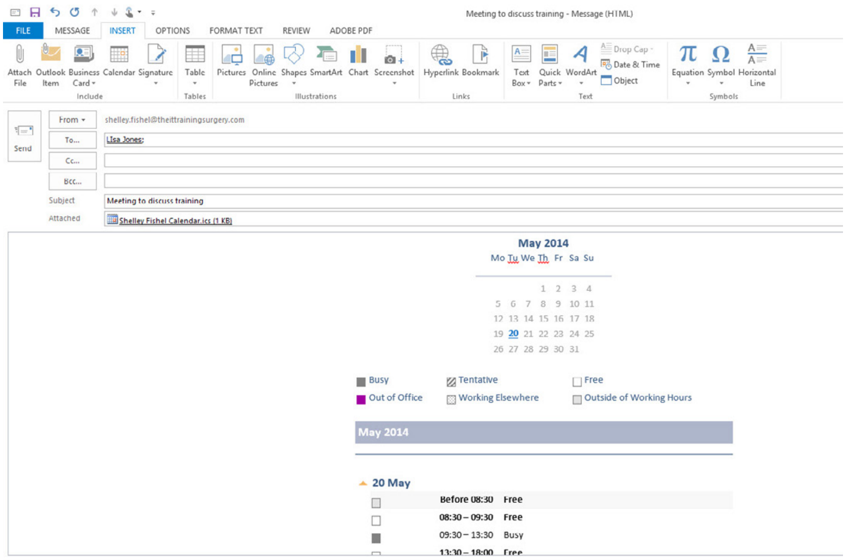


Figure 28 – add a copy of your calendar

Let's see how to create this.

2.4.2 Insert calendar

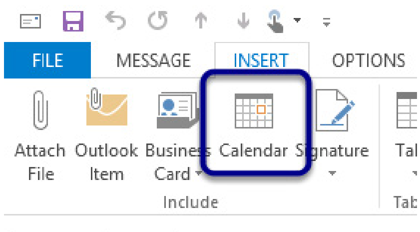


Figure 29 – insert calendar icon

1. Open the email you want to reply to
2. Click Reply
3. Now click into the white space where you write
4. Click the Insert Ribbon
5. Click Calendar

2.4.3 Select the date range

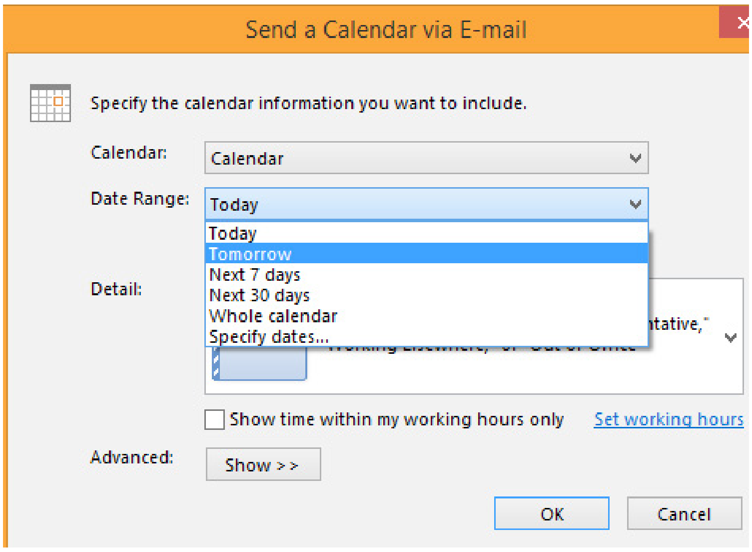


Figure 30 – specify the date range

Specify the Date Range.

2.4.4 Add detail

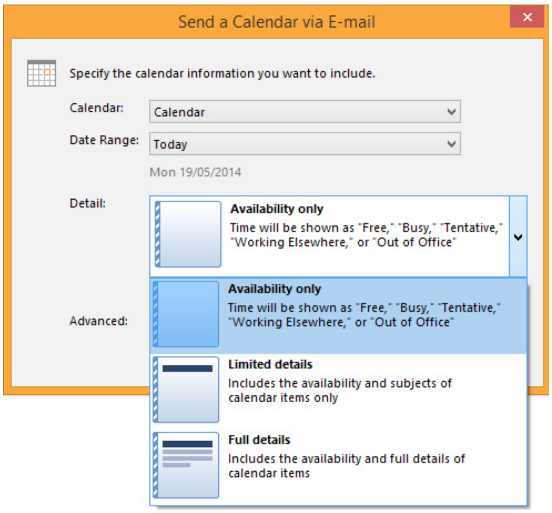


Figure 31 – specify the detail visible

Set which of the options you wish to show:

Availability only – this shows time as Free, Busy, and Tentative etc. The recipient will not be able to see what you are doing.
Limited details – Includes the subject of the calendar items
Full details – Shows availability and full details of calendar items

2.4.5 A copy of your calendar is added to the email

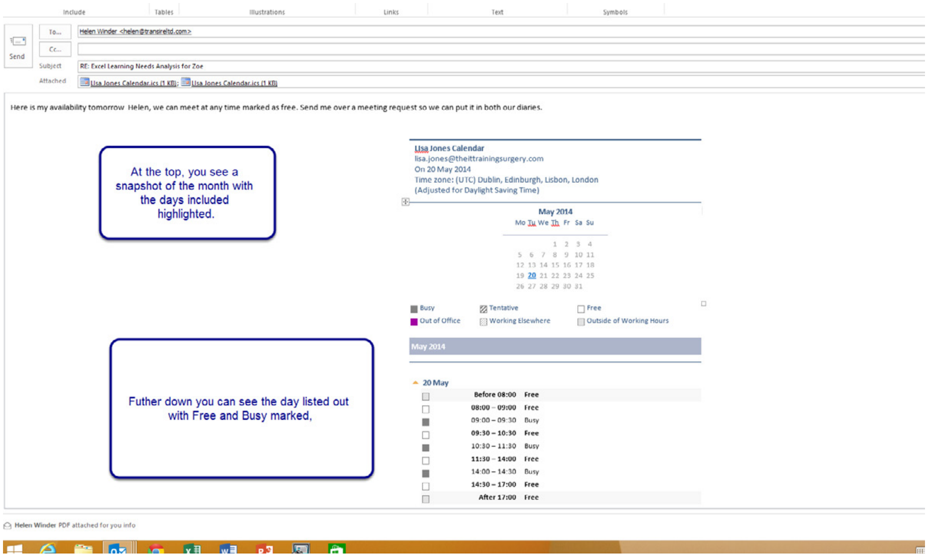


Figure 32 – copy of your calendar is inserted

Type the message at the top of the email and click Send.

3 Email options

Options you can set for email:
Change the Theme Colours, Fonts etc. – change how your email will look.
Show Fields – decide if you wish to have the BCC – Blind Carbon Copy Field or the from field showing.
Set Permissions – Use Rights Management Software to control what recipients can do with the email.
Use Voting Buttons – get your respondents to vote on a topic.
Request a Delivery Receipt – get an email telling you that your email was delivered.
Request a Read Receipt – make a window pop up so that the recipient can let you know whether they received your email.
Save Sent Item to – use this to change where your sent item is saved
Delay Delivery – set the time that the email should be sent
Direct Replies to – arrange for replies to be sent to someone else

3.1 Themes

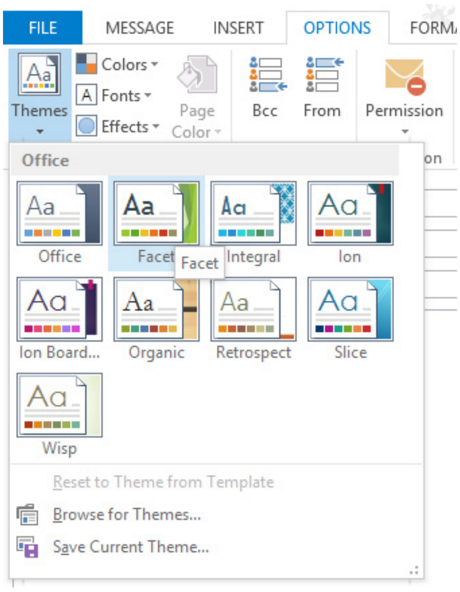


Figure 33 – themes govern design

1. In a new email, click the drop down under Themes
2. Select a Theme from those on offer
3. The Theme of the email will change, this means that formatting will take on the styles of the selected theme.

3.1.1 Formatting takes on the new theme

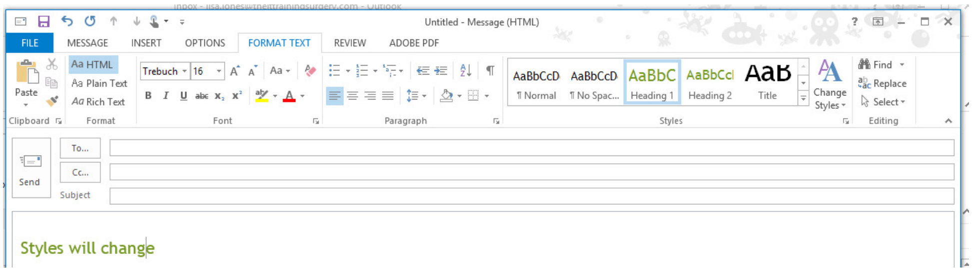


Figure 34 – see the format available with the chosen theme

4. Click on the Formatting Ribbon

Note that the styles have changed to reflect the new theme

3.2 Show fields

3.2.1 Show fields

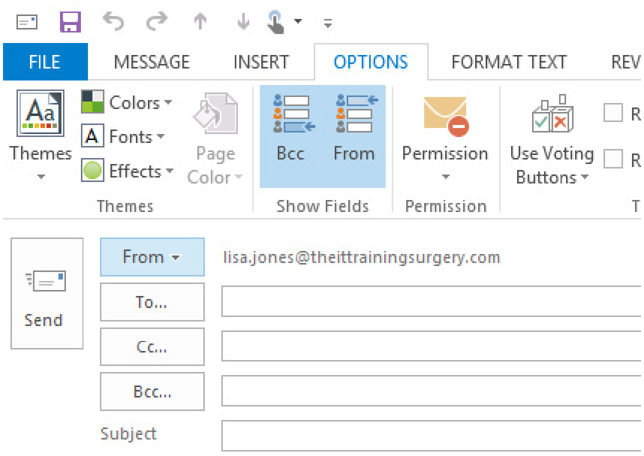


Figure 35 – bcc, and from can be displayed

Click BCC to display the option of copying in someone blind. Meaning that the person you are writing to does not know that a copy was sent to someone else.

Click From to send email from other email accounts rather than your main one. So if you have a personal account and a work account in Outlook you can decide here which account to send the email from.

3.3 Permission

Permissions allow you to control what can be done with an email.

3.3.1 Permission

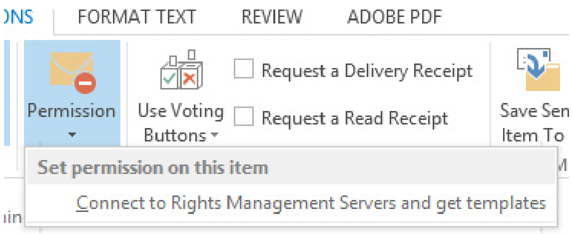


Figure 36 – connect to Information Rights Management to control permissions

If your organisation is using Information Rights Management you can decide what your recipients can do with the message. You control whether they can forward, print attachments or even read the email.

To use this feature you will need to connect to an Information Rights Server.

3.4 Vote

You can get your recipients to vote. You know, which pub shall we go to for drinks after work, or do they accept or reject a topic.

3.4.1 Standard voting Buttons

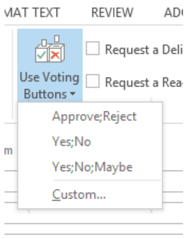


Figure 37 – add voting buttons to an email

1. Click the drop down under Use Voting Buttons
2. Select the options to use
3. You see a message in the header

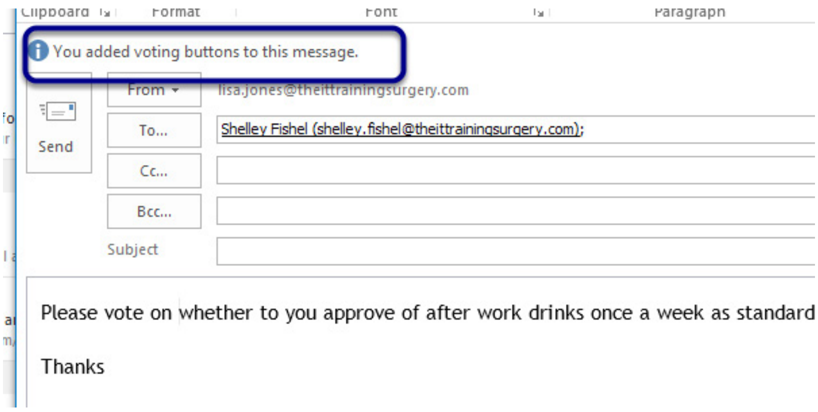


Figure 38 – see the buttons have been added

You see a message telling you that Voting Buttons have been added.

3.4.2 Click here to vote

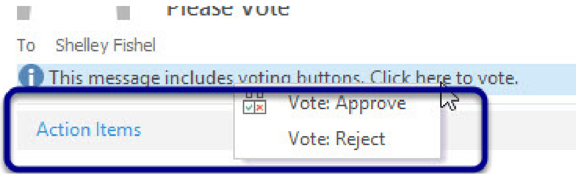


Figure 39 – recipient sees click here to vote

If your recipient does not actually open the email, they can still vote. The will need to click on the Click here to vote link at the top of the email.

Click the Button to vote.

3.4.3 Open the email to see voting buttons

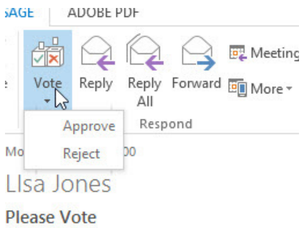


Figure 40 – in the email received the buttons are visible

The recipient opens up the email to see the vote options displayed on the ribbon

3.5 Preview attachments

How often do you want to see the content of a document attached to an email without actually opening the document? Or perhaps you have been sent several documents and you are not sure which one to open? Now you can preview attachments in Outlook before deciding whether to open them or not.

Preview an attachment

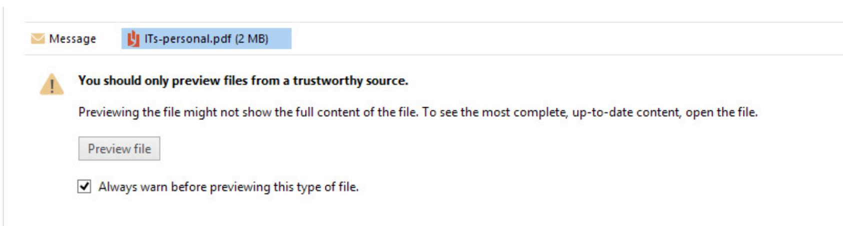
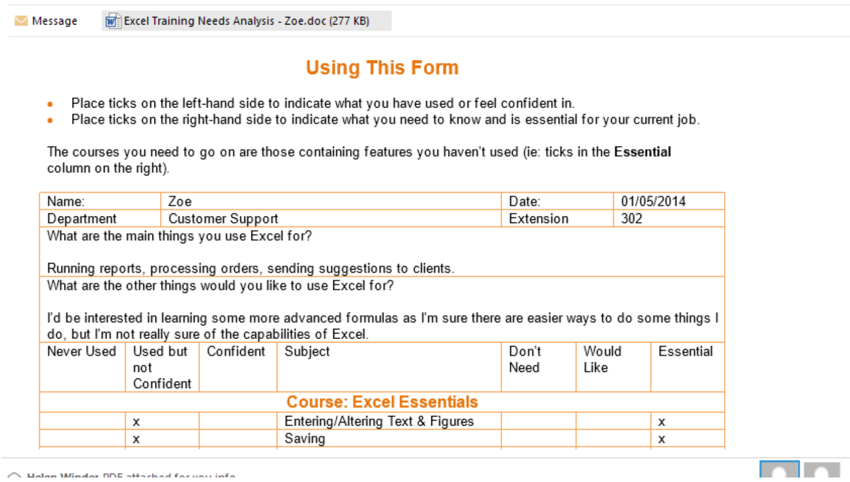


Figure 41 – preview an attachment to see if you want to open it

Click on the attachment in the message.

The first time you preview a document you will see the message above warning you that you may not see the whole file. If you are happy then click Preview File.

3.5.1 The file is previewed in the email



Message | Excel Training Needs Analysis - Zoe.doc (277 KB)

Using This Form

- Place ticks on the left-hand side to indicate what you have used or feel confident in.
- Place ticks on the right-hand side to indicate what you need to know and is essential for your current job.

The courses you need to go on are those containing features you haven't used (ie: ticks in the **Essential** column on the right).

Name:	Zoe			Date:	01/05/2014	
Department	Customer Support			Extension	302	
What are the main things you use Excel for? Running reports, processing orders, sending suggestions to clients.						
What are the other things would you like to use Excel for? I'd be interested in learning some more advanced formulas as I'm sure there are easier ways to do some things I do, but I'm not really sure of the capabilities of Excel.						
Never Used	Used but not Confident	Confident	Subject	Don't Need	Would Like	Essential
			Course: Excel Essentials			
	x		Entering/Altering Text & Figures			x
	x		Saving			x

Figure 42 – file opens indise the emal in Outlook

A copy of the file opens up inside the email and you can then decide whether to open it in full.

3.5.2 Open the attachment

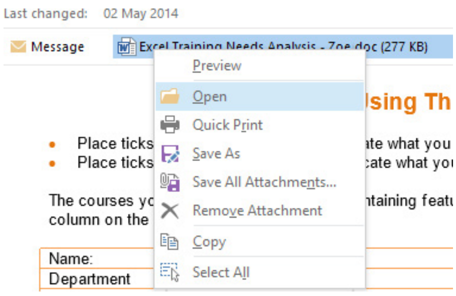


Figure 43 – open the attachment as normal

To open the attachment Right Click on the attachment and then select Open.

3.5.3 To close the preview

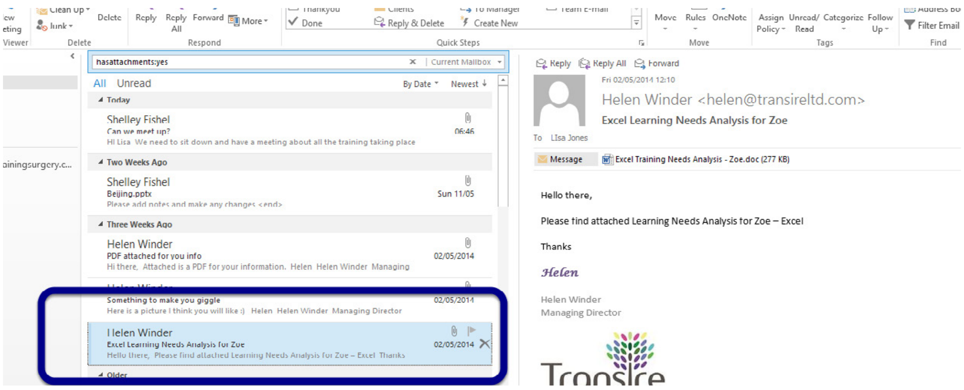


Figure 44 – click back on the email to close the preview

Click on the Email Header in the email list and the preview will close.

3.6 Insert and format a table

As versions of email have become more and more sophisticated, we are using email for documents instead of written letters. This means that we want to add elements to our email just like we would to documents. You can add tables and charts to your emails.

3.6.1 Insert a table

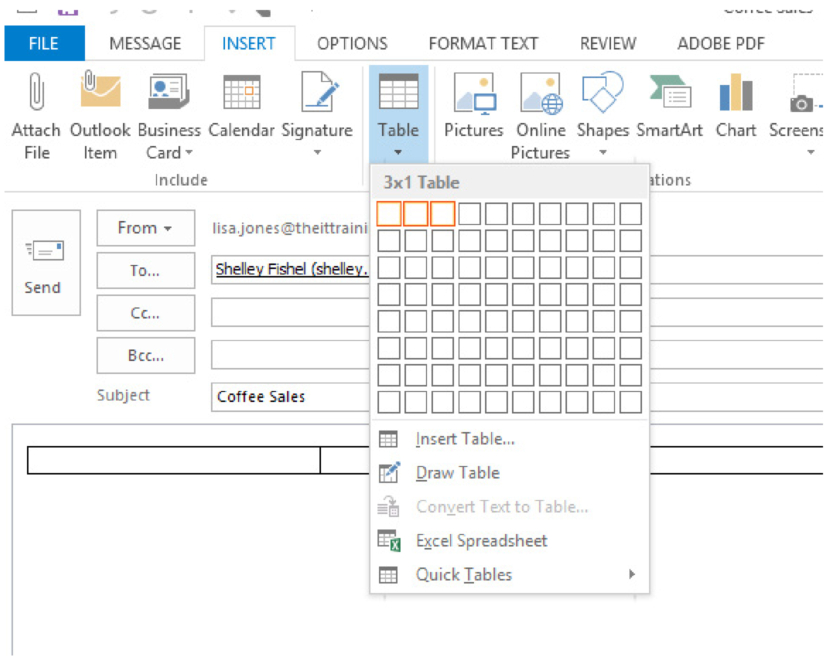


Figure 45 – insert a table into your email

1. Click into the body of the email
2. Click on the Insert Ribbon
3. Click on the drop down under Table
4. Select the number of squares you want as columns and rows

3.6.2 Format the table

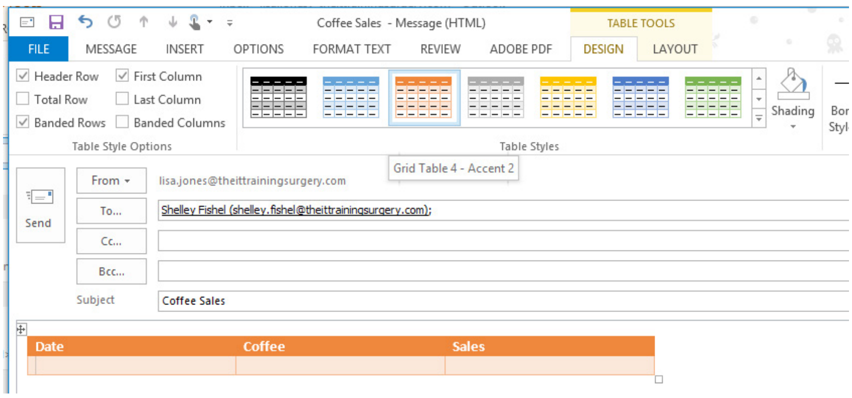


Figure 46 – use familiar formatting tools

1. Click inside the table
2. Click into the Table Styles gallery
3. Select the style to apply
4. The table is now reformatted

3.6.3 Add columns and rows

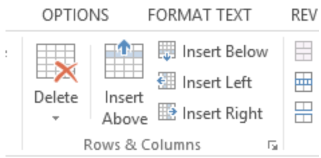


Figure 47 – add columns and rows

1. Click into a column
2. Click the icon that inserts a column Left or Right
3. Click the icon that inserts a row Below or Above

3.6.4 Format the table just like in Word

You can format the table just like you can in Microsoft Word. All of the same formatting options are available.

3.7 Insert a picture

Email is used quite extensively for either sending a picture to someone for them to use or for inserting a picture directly into the email body.

3.7.1 Insert a picture from your computer

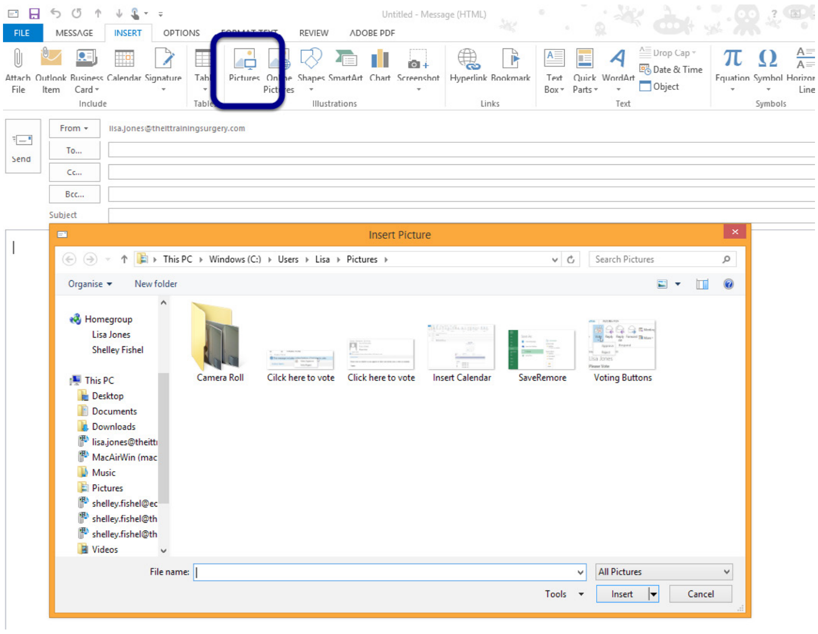


Figure 48 – add a picture into the email

1. In the body of the email click on the Insert Ribbon
2. Click Pictures
3. Navigate to the folder where the picture is stored
4. Click Insert

3.7.2 Format picture tools

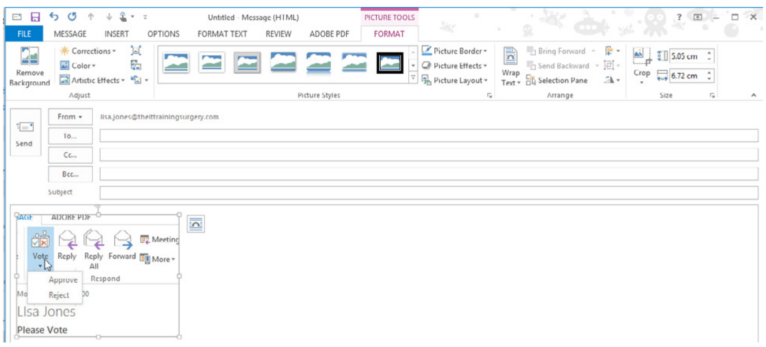


Figure 49 – use the Picture tools to format the picture

Now that a picture is in the body of the email, whilst it is selected the Picture Tools Format Ribbon appears. Here you can add a border, compress the image or in fact do any type of picture editing available.

3.7.3 Insert an online picture

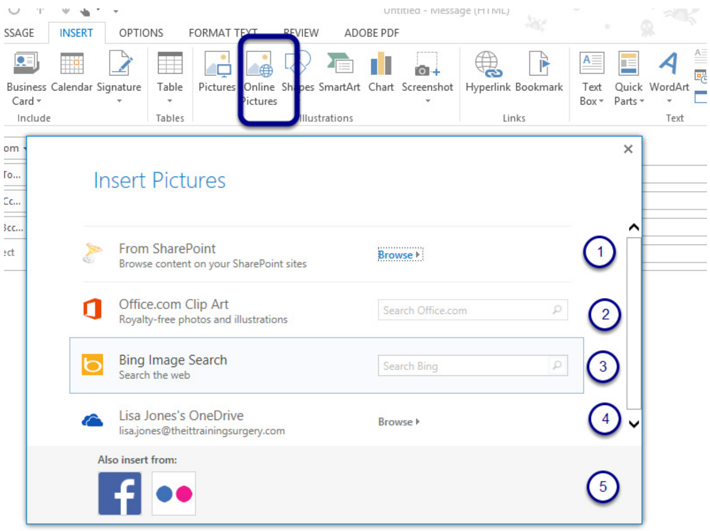


Figure 50 – insert a picture from a web location

Pictures can be retrieved from online storage as well as from the Pictures folder on your PC.

1. From SharePoint – if you are using SharePoint to keep organisational images and the SharePoint site is synchronized with your computer, then you will see this option. Browse for the image and click Insert.
2. If Clip Art is what you are after, type the search term into the search box and click the magnifying glass then select the image you want.
3. Search for an image that makes your point using Bing Image Search – remember to take care with copyright.
4. OneDrive – OneDrive is your personal online storage that comes with either your personal Oultook.com or Hotmail account or with your Orgnisational account – find images you have saved here.
5. Flickr and Facebook – connect these online social sites to Outlook and retrieve pictures you have uploaded to them.

3.8 Create a signature

Why type your signature each time you send an email? Have Outlook do it for you.

3.8.1 Create a signature

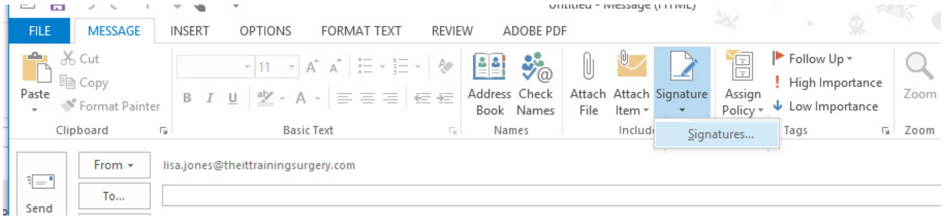


Figure 51 – insert a signature

Click on Signature in the Message ribbon

Click Signatures – this takes you to the Signatures and Stationery section

3.8.2 Type a name for the signature

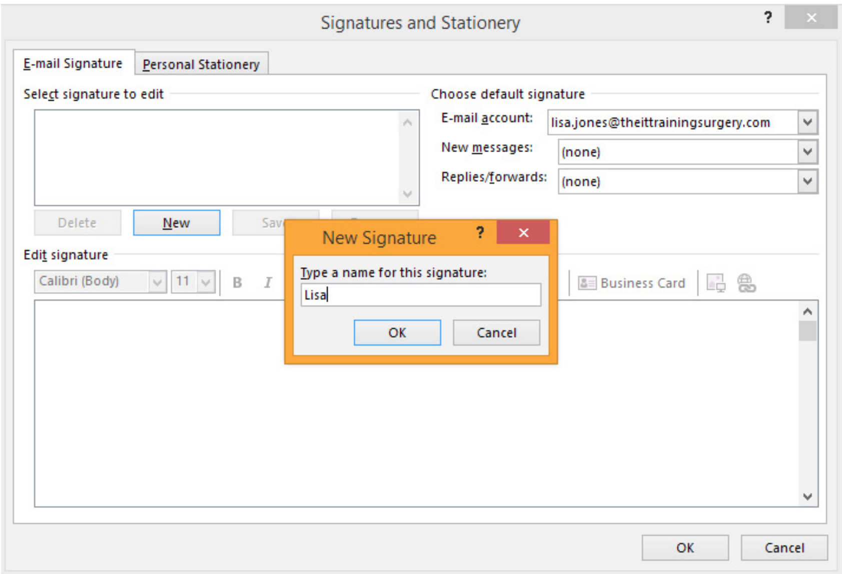


Figure 52 – name the signature

Click New

Type a name for the signature so that you can identify it later.

3.8.3 Type the signature

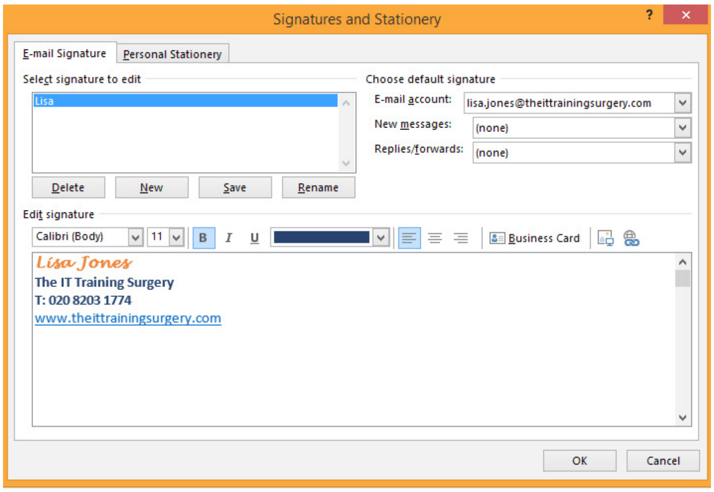


Figure 53 – type the signature or copy and paste the text from another location

1. In the white space, type the text for the signature.
2. Use the formatting options to format the signature.
3. You can add a hyperlink or pictures as well.

3.8.4 Choose a default signature

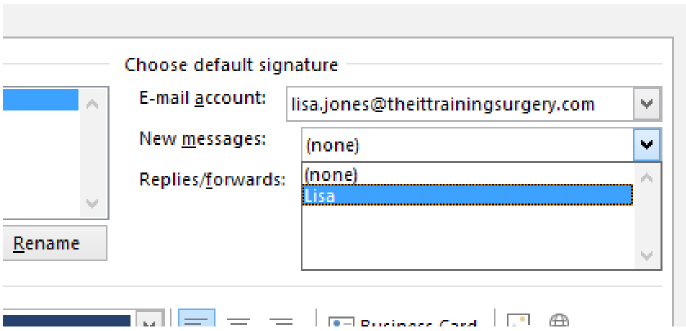


Figure 54 – set a default signature to be used all the time

If you want to have a signature appear automatically on every new email select the signature from the New messages option.

To have a signature appear automatically on every reply or forward, select the signature from the Replies/ forward option

3.8.5 Insert a signature from the ribbon

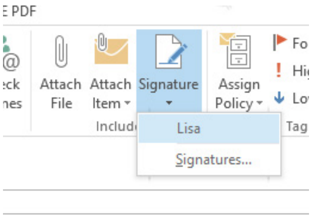


Figure 55 – insert the signature

Click on the drop down under Signature
Select the signature to add

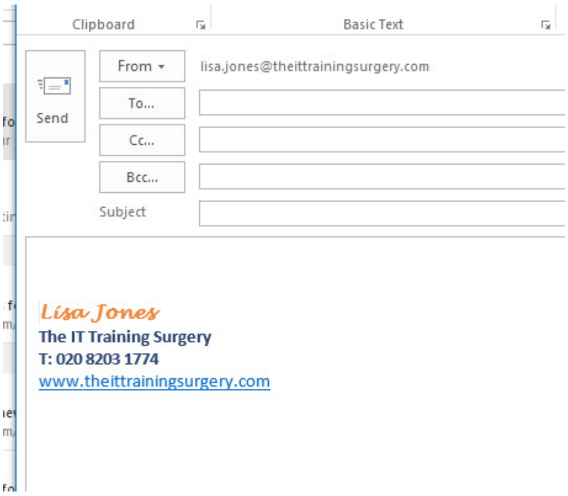


Figure 56 – signaure is added

A signature is added!

4 Conversations

4.1 Conversation view

Conversation View allows you to group incoming and outgoing email. It puts all emails that are part of a conversation together and collapses them all under the latest one. Expand the top level email to see all the relevant emails that are part of the conversation.

4.1.1 Display email in Conversations

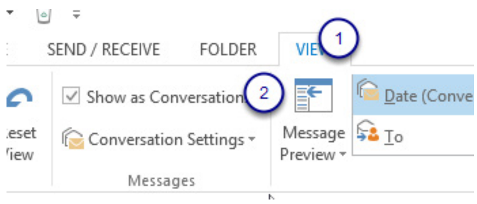


Figure 57 – show in conversations

1. Click on the View Ribbon
2. Tick the box Show as Conversations

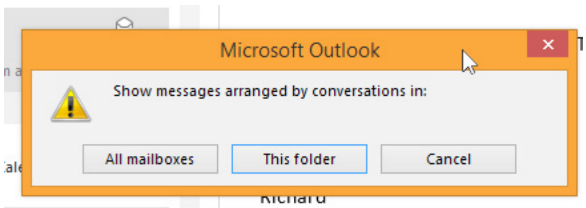


Figure 58 – decide if applies to this folder or all folders

Decide if this view should apply to the current folder only or to all mailboxes.

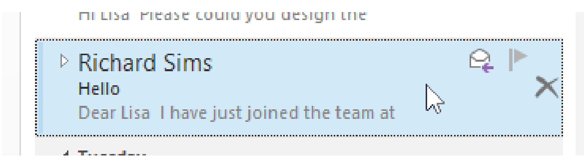


Figure 59 – emails now show in conversations

This email from Richard has a triangle next to his name – this denotes a conversation. To expand the conversation and see all the emails click on the triangle.

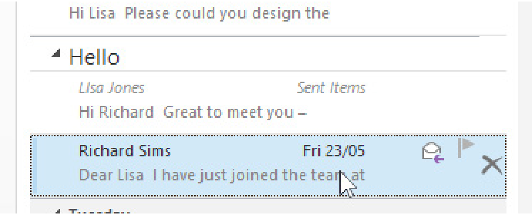


Figure 60 – conversations can be expanded or collapsed

Note that the Subject of the conversation is Hello and underneath are two emails in this case, one from Richard to Lisa and then the reply from Lisa to Richard – note that it is stored in Sent Items.

Conversation are useful when you need to keep track of a long list of emails going to and fro. Here they are kept all in one place.

4.2 Conversation cleanup

Conversation Cleanup deletes all the messages that you no longer need – these are the messages whose text is contained within later messages. Typically when you reply to an email, the original text is kept in the email underneath your reply. In this case there is no need to keep the original clogging up your inbox.

4.2.1 Clean up a conversation

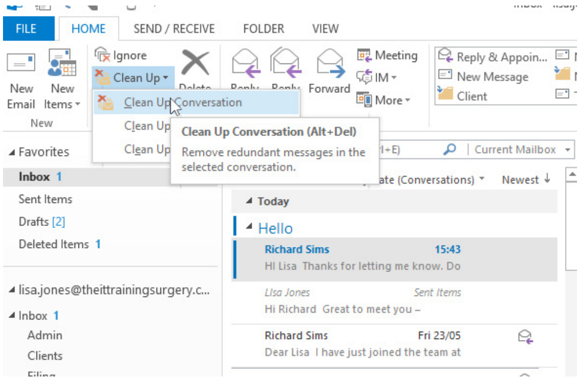


Figure 61 – remove redundant messages from a conversation

1. On the Home Ribbon click the drop down arrow under Clean Up
2. Select Clean up Conversation

In this conversation there are three messages:

- The original one from Richard to Lisa
- The response from Lisa to Richard
- A reply from Richard to Lisa's response

When Lisa cleans up the conversation, the original email from Richard will be removed as the text is included in the other two.

4.2.2 Cleaned up conversation

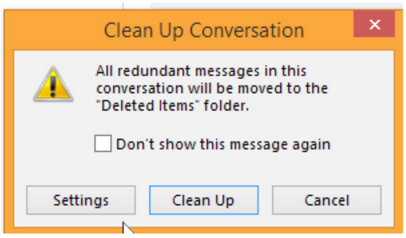


Figure 62 – check you are happy to clean up the conversation Click Clean Up if you are happy to go ahead

Here is that conversation again, now it has been cleaned up – the original message from Richard has gone.

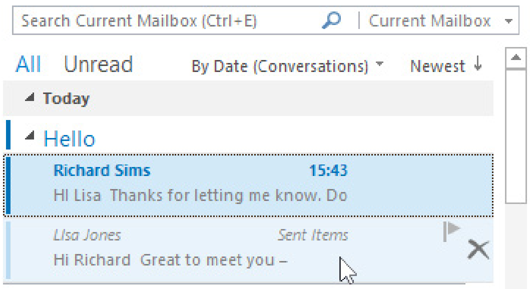


Figure 63 – cleaned up conversation

4.2.3 Messages are cleaned up according to your settings

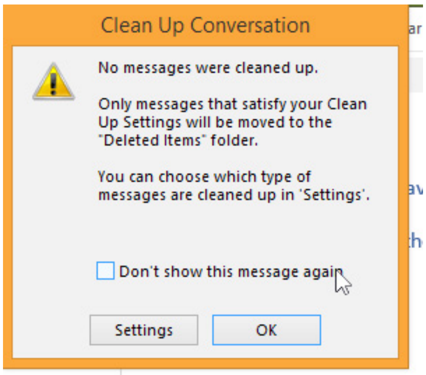


Figure 64 – clean up according to your settings

Click Settings to get to the Clean Up settings.

4.2.4 Settings

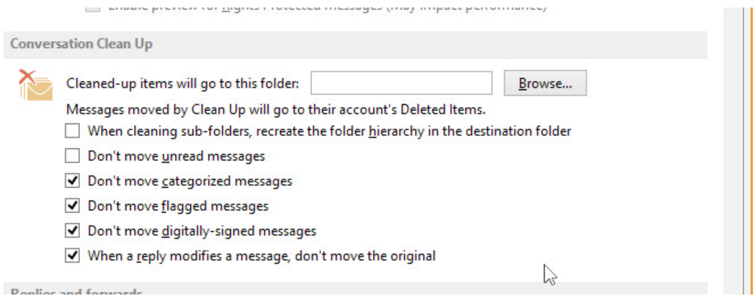


Figure 65 – check the boxes to set your options

1. Tick or un-tick the boxes
2. Click Browse to set where cleaned up messages go – usually this is the Delete folder

4.2.5 Clean Up Folder

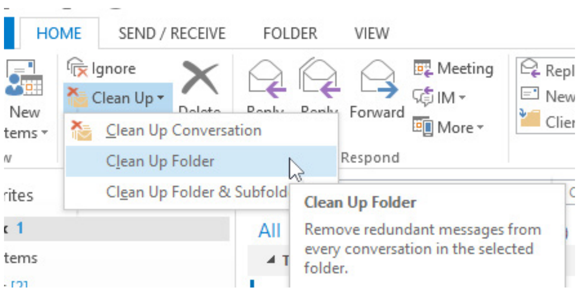


Figure 66 –clean up a folder

This command reviews all messages in the current folder and removes any that are contained within the body of any other message.

4.2.6 Clean Up Folder & Sub Folders

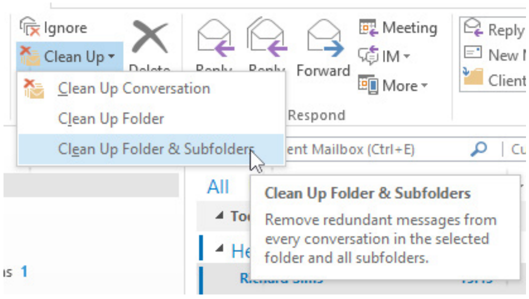


Figure 67 – clean up subfolders too

This command looks at all the messages in the current folder and any subfolders that it may have. It will remove any messages that are early parts of conversations and are contained within the body of other messages.

4.3 Ignore a conversation

You can choose to ignore a conversation. This will move all email in that conversation to the deleted items folder and it will automatically move any future emails directly to the deleted items folder so long as they have the same subject.

Be careful with this one as Outlook identifies the conversation based on the subject line. If you receive email in the future with the same subject line, that will be ignored too!

4.3.1 Ignore

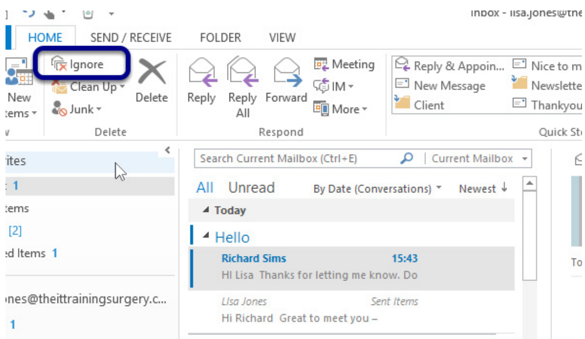


Figure 68 – ignore certain conversatins when cleaning up

If I ignore this conversation not only will it move to the deleted items folder but any future emails will too.

In addition if anyone else emails me with the subject line Hello those emails will also be ignored!!

5 Deleting email

5.1 Delete email

Keep on top of your inbox – delete all unwanted email.

5.1.1 Delete email from the ribbon

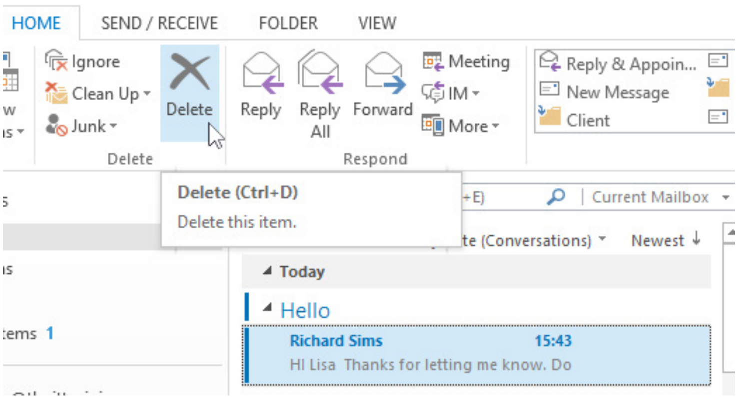


Figure 69 – delete email

1. Select the email to delete
2. Click Delete on the ribbon, or
3. Press Control + D to move the message to the Deleted Items folder

5.1.2 Delete an email from the email list

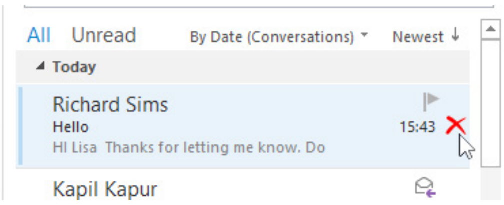


Figure 70 – use the red cross

Click on the red cross on the right of the message in the list.

5.1.3 Permanently delete

If you are certain that you want to delete an email and you want to bypass the Deleted Items folder, hold down the Shift key when you press Delete on the keyboard or you click on the cross.

This command tells Outlook to remove the email from Outlook altogether and you will not be able to retrieve it.

5.2 Empty deleted items

Whilst training Outlook for many years, one of the things I have frequently seen, is people using the Deleted Items folder as a kind of "I might need that one day! folder. This means that it can have thousands of emails and deleted appointments and tasks in it as it is never emptied.

Imagine that you have a waste paper basket in your office. It gets full up eventually, once you empty it into the main rubbish and it gets taken away, that's it! You can't get it back. Now imagine that you NEVER empty the bin in your office – eventually you will be drowning in rubbish. Well your computer or rather your Exchange is getting fuller and fuller with deleted items. They count towards the quota of email in your inbox and get backed up the same way as everything else.

Not only is it inefficient – it could also be costing you or your organisation in financial terms as backups and storage cost money.

The moral? File your email if you think you may need it again and Empty the Deleted Items folder frequently!

5.2.1 Empty deleted items

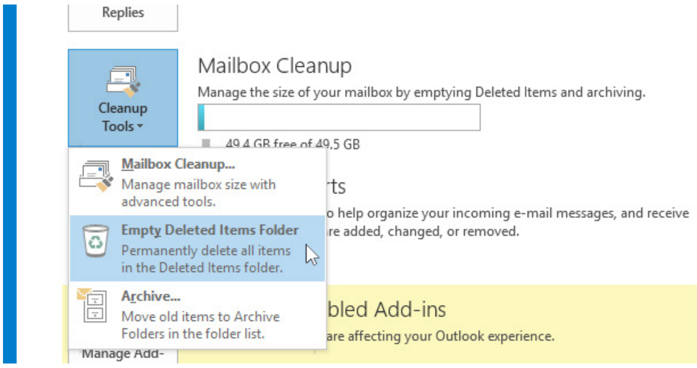


Figure 71 – empty deleted items

1. Click File
2. Click the drop down under Cleanup Tools
3. Click Empty Deleted Items Folder

5.2.2 Confirm

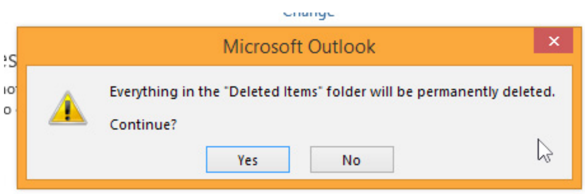


Figure 72 – confirm that you want to empty the deleted items folder

4. Click Yes

5.2.3 Add empty deleted items to the Quick Access Toolbar

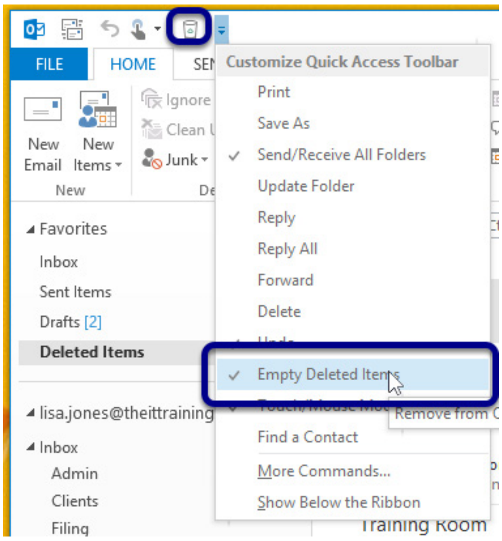


Figure 73 – add to the Quick Access toolbar for ease of use

Add the Empty Deleted Items Icon to the Quick Access Toolbar.
Click on the icon to Empty the Deleted Items Folder.

5.2.4 Set Outlook to empty deleted items when exiting Outlook

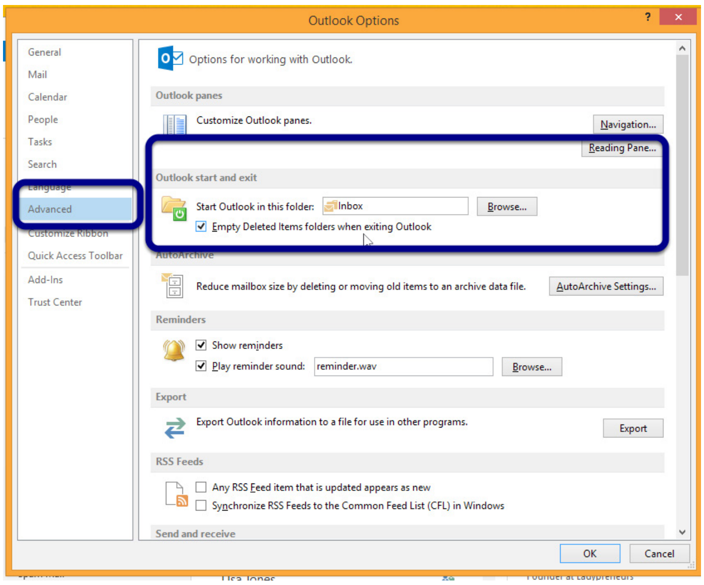


Figure 74 – set Outlook to empty deleted items on exit

1. Click File
2. Click Options
3. Click Advanced
4. Tick the box – Empty Deleted Items when exiting Outlook – with this option ticked, Outlook will take care of emptying the Deleted Items folder each time you exit the program.

6 Filing

6.1 Create a folder

Create folders to file your email
Right Click

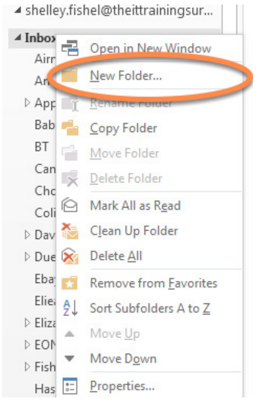


Figure 75 – create a new folder

Left click on New Folder

6.1.1 The Folder Ribbon

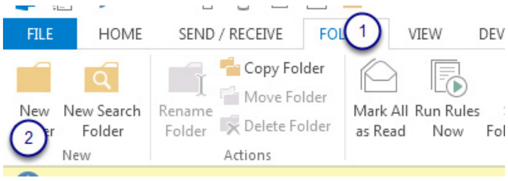


Figure 76 – the Folder Ribbon

Click on the Folder Ribbon (1)
Click New Folder (2)

6.2 Drag and drop to file email

A simple way to move one or more email from your inbox to a folder, is to drag the email(s) and drop them on the folder you want to put them in.

6.2.1 Drag one email

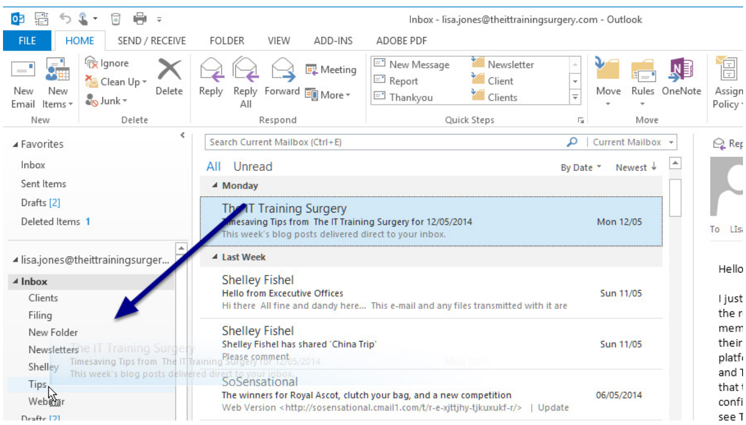


Figure 77 – drag to file

1. Click on the email you wish to move
2. Drag keeping the left mouse button down
3. Drop it onto the folder you wish to place it in.

6.2.2 Drag and drop several emails

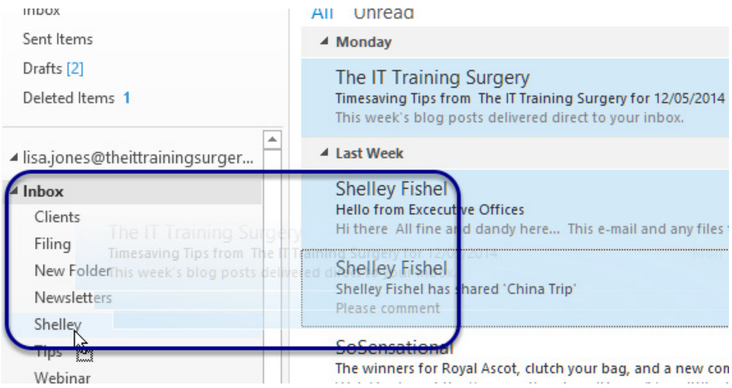


Figure 78 – drag multiple to file

Select the emails to move:

To select emails that are next to each other in the inbox click on the first one then hold the shift key and click on the last one.

If the emails are not next to each other – hold down the Control Key whilst clicking on each one.

Once you have them all selected, drag them to the folder where you want them to be filed.

6.3 The move button

When filing email dragging and dropping is fairly quick and easy except in the following scenario. You need to move a whole lot of email and you select them all. Then you drag them over to the folder list to drop them into your chosen folder. So far so good. Well now, if you are anything like me you probably have loads of folders and when dragging a bunch of email it is so easy to drop them in the wrong place! So the Move button comes to the rescue!

6.3.1 The move button

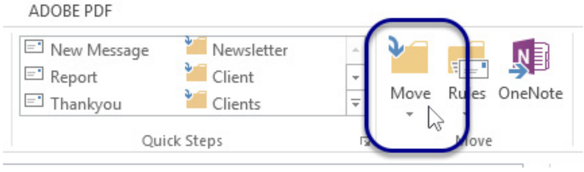


Figure 79 – the Move button

6.3.2 Move email

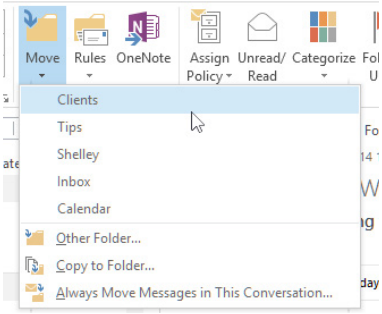


Figure 80 – click to move

1. Select the email(s) you want to move
2. Click the Move Button
3. The Move button will remember the last 10 folders you moved email to
4. Click on the folder to use

6.3.3 Other folder

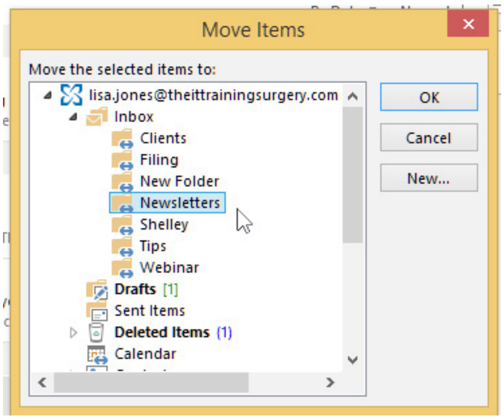


Figure 81 – move to a folder not on the list

If the folder you want to move email to is not in the list click the Other Folder shortcut on the list
Select the folder you want to move to
Click OK

6.3.4 Create a new folder to move to

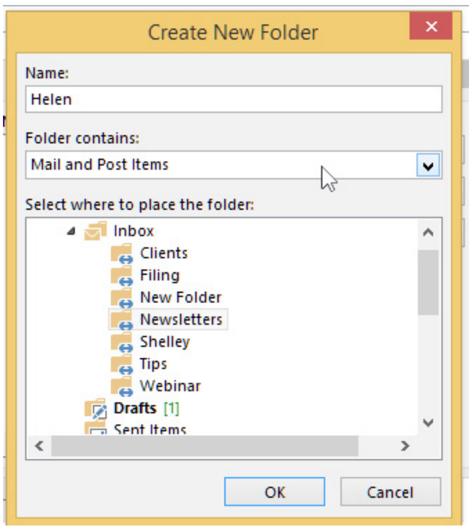


Figure 82 – create a new folder on the fly

If this is the first time you are filing email for a particular client or category, you need to create the folder on the fly.

1. Click on Other Folder
2. In the box click New
3. Name the new folder
4. Click OK
5. Click OK again
6. The email will be filed

6.3.5 Always move messages in this conversation

When messages are arranged as a conversation, meaning that the replies are grouped with the original, you can decide to have all messages in the conversation moved automatically. This will move all the current messages in the conversation and all future ones too.

7 Quicksteps

7.1 QuickStepsin Outlook

QuickStepsallow you to make repetitive tasks really simple and easy, tasks like filing email or sending an email to a group. Most things that you find yourself doing on a regular basis can become a QuickStep.

7.1.1 QuickStepslive on the Ribbon

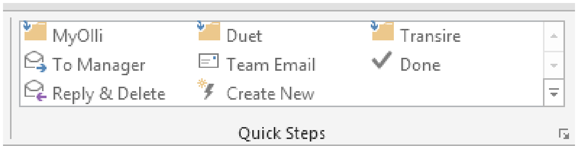


Figure 83 – Quickstep Galeery

The QuickStepsGallery – my pictures are from Outlook 2013, however the same rules apply in Outlook 2010

7.1.2 To create a new QuickStep for filing

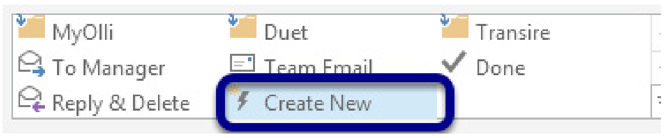


Figure 84 – Create new quickstep

1. Click Create New
2. Name the new QuickStep

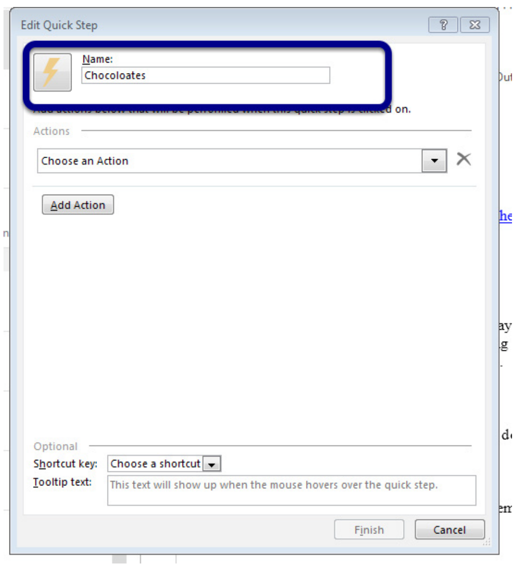


Figure 85 – type a name

3. Select the action to perform

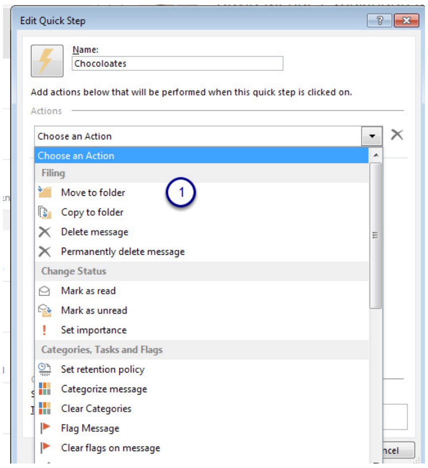


Figure 86 – tell it what to do

4. Choose one of the actions
5. Select action to perform

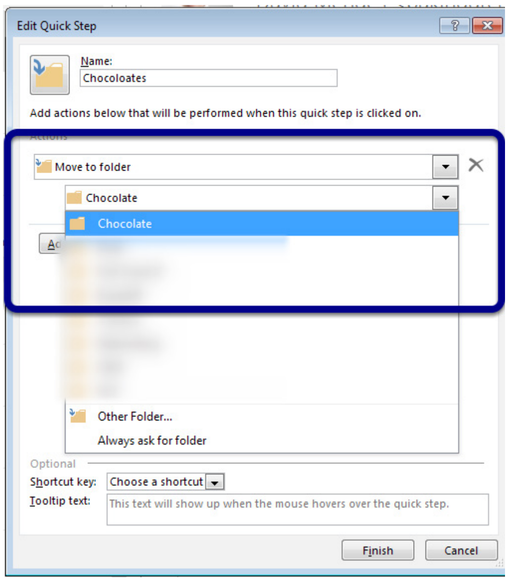


Figure 87 – move

6. I chose Move to Folder and selected the folder called Chocolate from the list.
7. Add any other actions

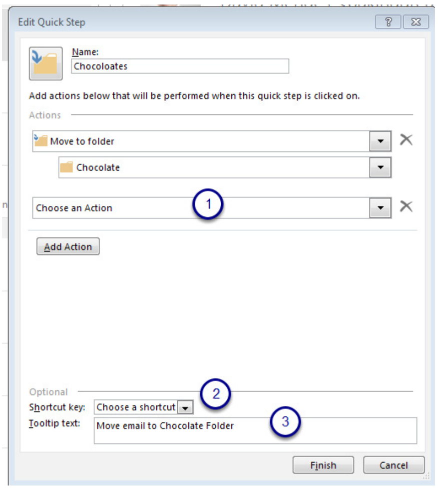


Figure 88 – choose the folder to move to

8. You can add further actions to the QuickStep (1), select a Keyboard Shortcut (2) and add some text to display when your mouse hovers over the QuickStep (3) – to remind you what it does.

9. Click Finish

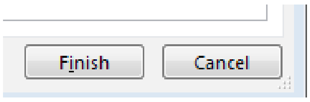


Figure 89 – finish

10. Your new QuickStep is ready to use

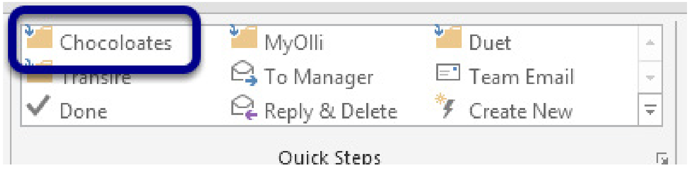


Figure 90 – Quickstep in the gallery

7.1.3 To use the QuickStep

1. Simply select the emails you wish to file
2. Click on the QuickStep in the Gallery

Hey Presto! They moved!!

7.2 Categorise and move

In this QuickStep we see how to categorise an email and move it to a folder in one go.

7.2.1 Create the QuickStep

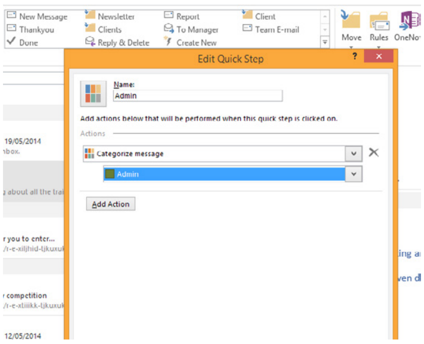


Figure 91 – create new as before

1. In the QuickStepsgallery click Create New
2. Type a name for the QuickStep – I have called this Admin
3. Select the action – in this case Categorise Message
4. Choose the Category – I chose Admin
5. Click Add Action

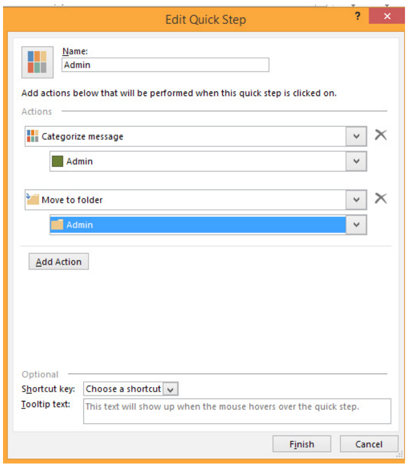


Figure 92 – add actions

6. Select the action – in this case Move to Folder
7. Select the Folder – in this case Admin
8. Choose a Shortcut key if required
9. Click Finish

Now when I use this QuickStep the message will be categorised as Admin (colour green) and moved to the Admin folder.

7.3 Flag and move

This QuickStep will flag an email for follow up and move it to a specified folder.

7.3.1 Flag and move to folder

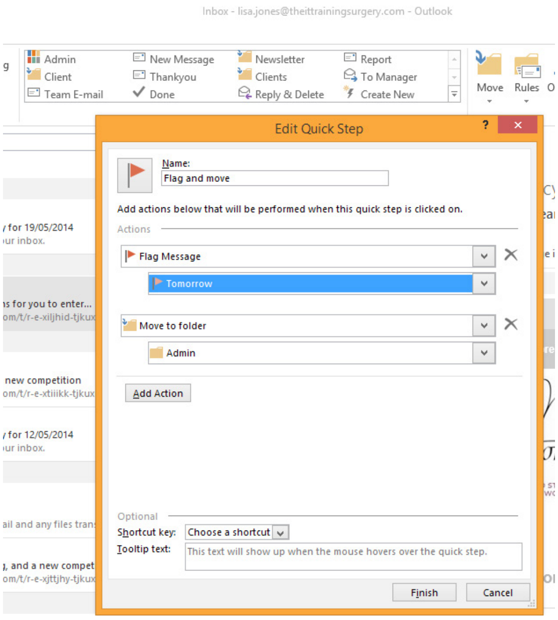


Figure 93 – add the flag action to the Quickstep

1. Click Create New in the QuickStepsGallery
2. Type a name for the QuickStep
3. Choose the first action – in this case Flag Message
4. Select the flag to use – I chose tomorrow
5. Add an action
6. Choose the action – I chose move to folder
7. Select the folder – I chose Admin
8. Click Finish

Now when you use the QuickStep – the message will be flagged for follow up and moved to the specified folder.

7.4 New email to

Is there someone you find yourself addressing an email to all too often? It can become tedious to start a new email and add the address each time. This QuickStep allows you to set up a new email to a particular addressee at the click of a button.

7.4.1 New email to

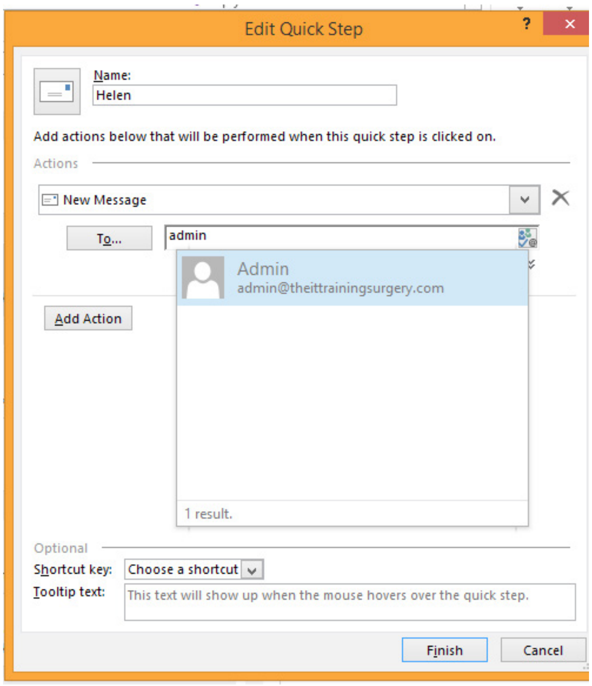


Figure 94 – type the email address to use

1. Click Create New in the QuickStepsgallery
2. Type a name for the QuickStep
3. Select an action – in this case New Message
4. Type the email address of the person to message (or select from the list offered)
5. Add any further actions you may want
6. Click Finish.

When you click the new QuickStep a new email will be started ready to send to the person you selected here.

7.5 Forward to

Do you find yourself forwarding lots of email to someone else? Create a QuickStep that will set up the forwarding of the email you have selected to the person you specify.

7.5.1 Create new QuickStep

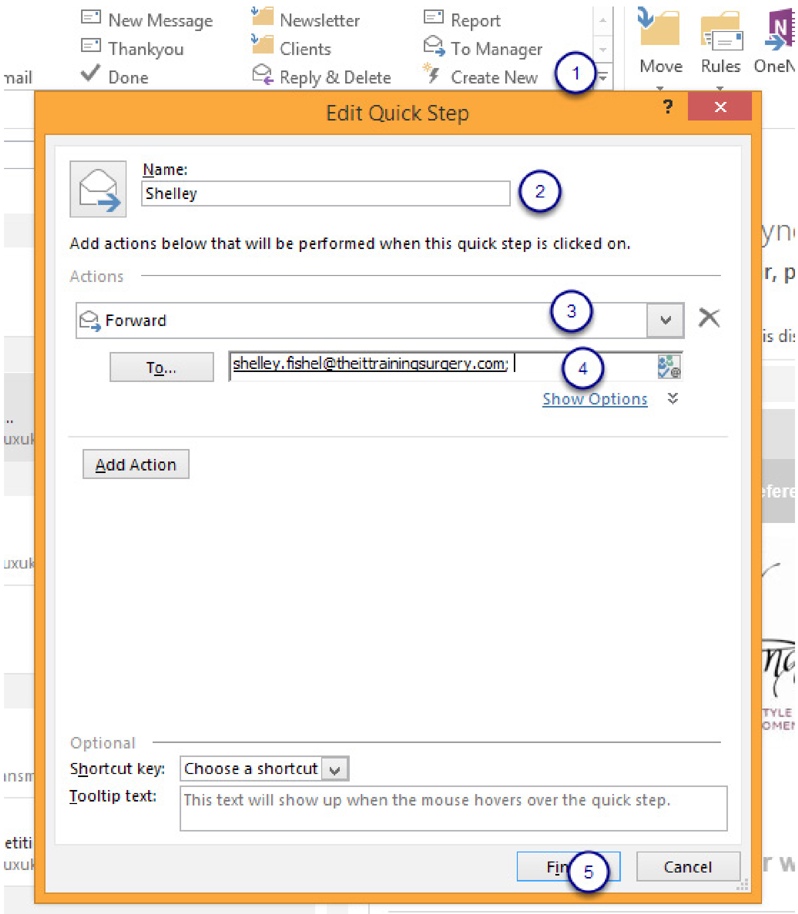


Figure 95 – choose who to forward to or type the email address

1. Click Create New in the QuickStep gallery
2. Type a name for the QuickStep
3. Select an action – in this case Forward
4. Type the email address of the person to forward to (or select from the list provided)
5. Click Finish.

7.6 Meeting with

If you find that you are often setting up a meeting with a particular person – a colleague or your line manager, create a QuickStep to get off to a head start.

7.6.1 New meeting with

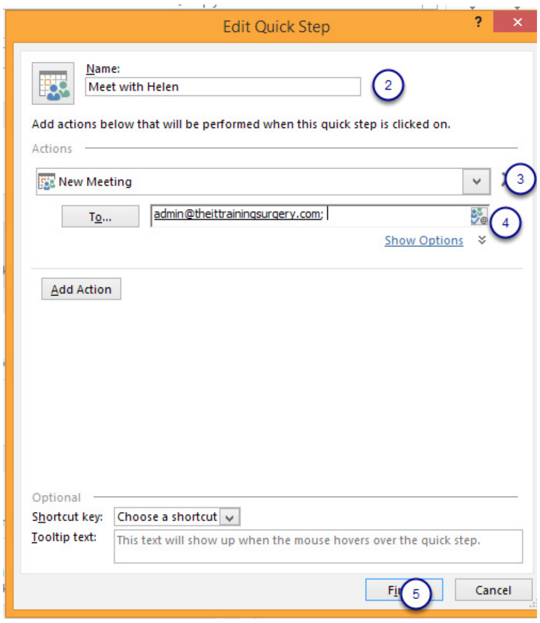


Figure 96 – choose New Meeting to begin

1. Click Create new from the QuickSteps gallery
2. Type a name for the QuickStep
3. Choose an action – in this case New Meeting
4. Type the email address of the person to meet with (or select from those suggested)
5. Click Finish

There are other Meeting QuickStepsto choose from.

Reply with Meeting – this will set up a reply to an email with a meeting ready for you to populate.
Create an appointment with attachment – this sets up an appointment and puts the email you are sitting on in the body of the appointment as an attachment – handy if you need to keep all the information in the email.
Create appointment with text of email – sets up an appointment with the text of the email in the body of the appointment.

7.7 Standard response and add to calendar

I was asked recently, can we have a Quickstep that sets up a standard response and creates an appointment in my calendar? This means two jobs being done at once. So here is how.

7.7.1 Add actions to the QuickStep

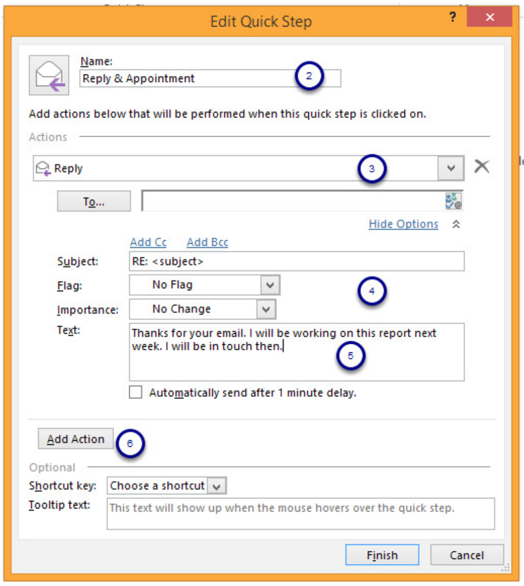


Figure 97 – add actions

1. Click create new
2. Name the QuickStep
3. Select Reply – to create a reply to an email
4. Add flag or set importance
5. Type the body of the message (standard text)
6. Click Add Action

7.7.2 Select action

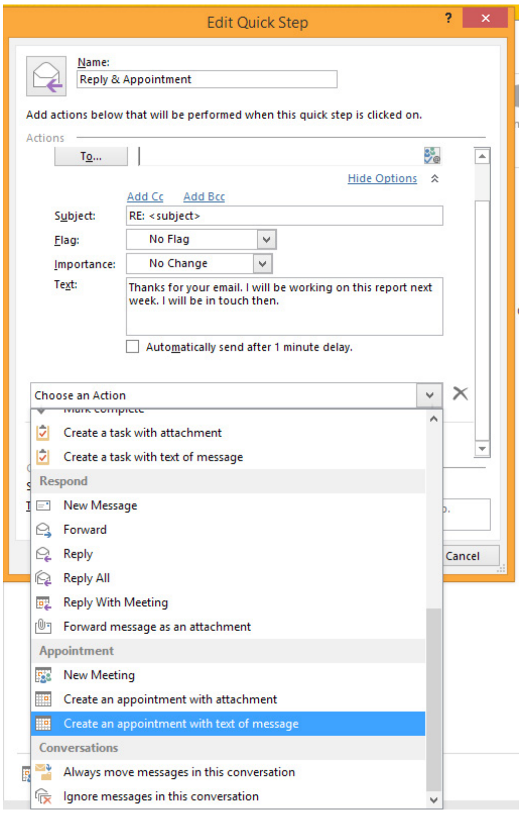
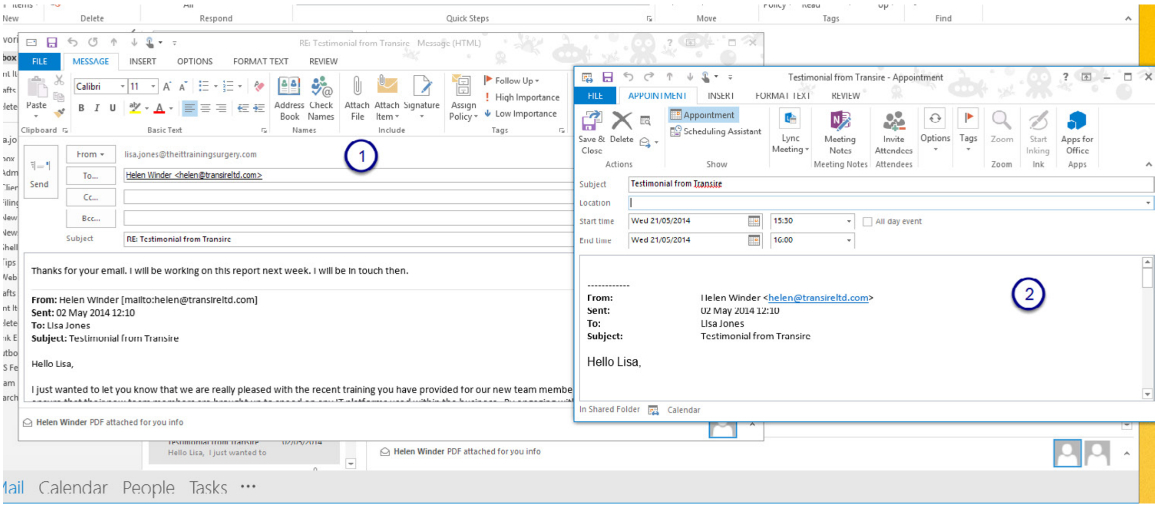


Figure 98 – choose the action

7. Select "Create an appointment with the text of the message" – this will create an appointment in your calendar with the message text included.
8. Click Finish



Click the new QuickStep

1. Outlook creates a standard reply ready for you to add any further information before clicking send.
2. Outlook also creates an appointment with the text of the message included.

8 Custom Quicksteps

8.1 Create a standard email response

If you find yourself replying to email with a standard response then this is for you!

8.1.1 Create a new Quickstep

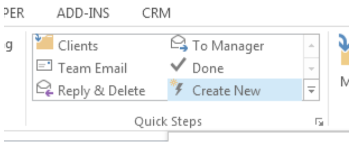


Figure 99 – new custom quickstep

1. In the QuickSteps group click on Create New
2. Name the QuickStep and start to build it

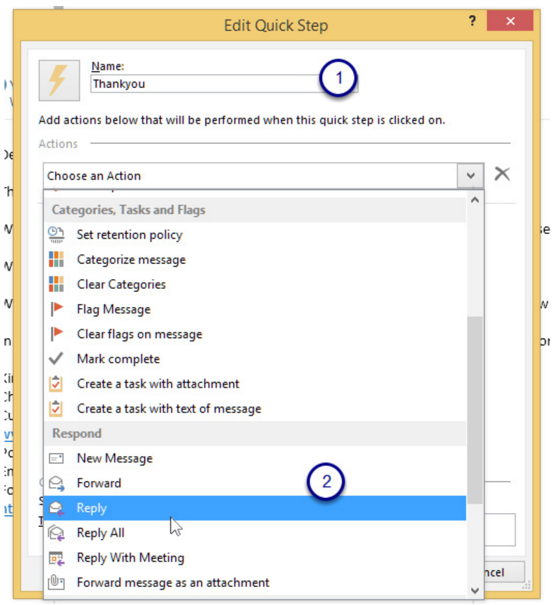


Figure 100 – name and build

3. Type a name
4. Select Reply
5. Show Options to add the text

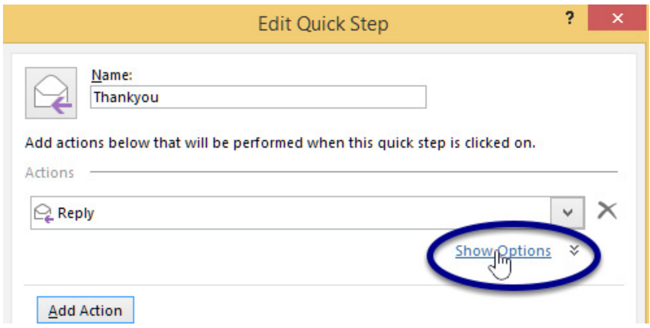


Figure 101 – show options to add text

6. Add the detail

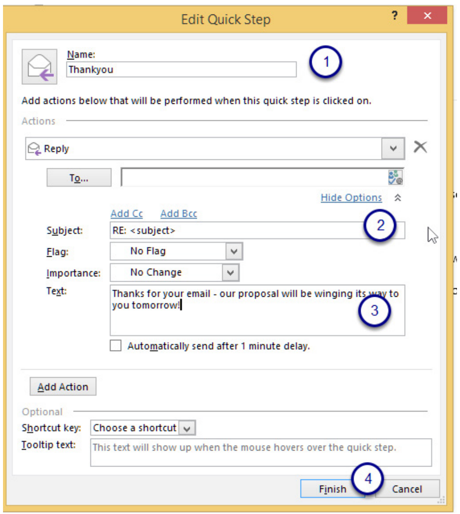


Figure 102 – type the text in the box

7. The subject is populated because this is a reply
8. Type the text
9. Click Finish

8.1.2 Your new QuickStep

Figure 103 –new quickstep in the gallery

Your new QuickStep is now in the QuickSteps group and is ready to use.

8.1.3 To launch a new email with the standard text

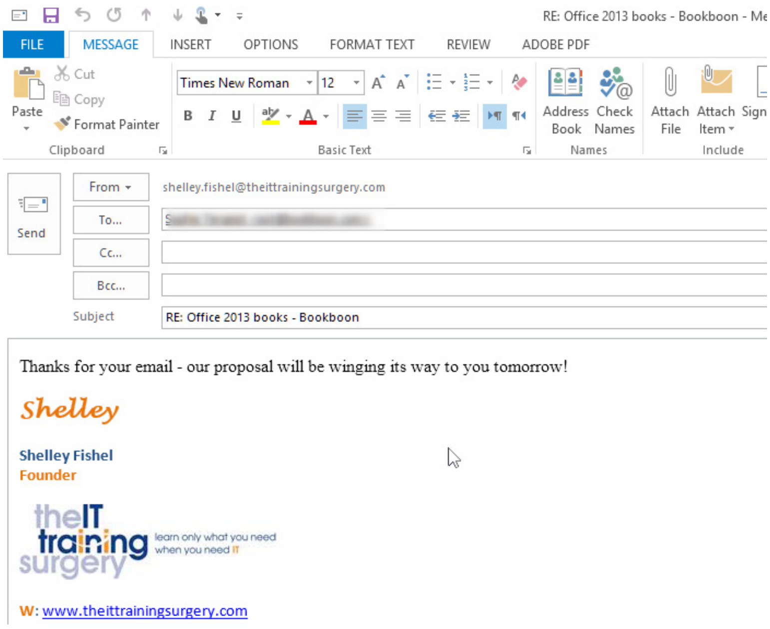


Figure 104 – click the quickstep in the gallery to launch

1. Click on the QuickStep in the QuickStep group
2. An email reply is set up
3. Finish off the email with any sign off that you require

If you have your signature set to be added to all your outgoing email, it will be appended automatically.

8.2 Standard email

In the previous section we saw how to set up a standard email response. In this section we will see how to set up a standard new email.

8.2.1 New message

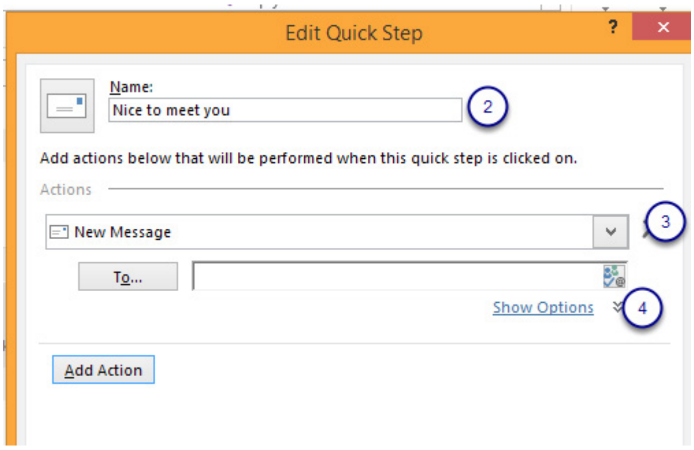


Figure 105 – create a new message to

1. Click Create New from the QuickSteps gallery
2. Type a name for the QuickStep
3. Add an action – New Message
4. Click Show Options – this is where you will type the message
5. Fill in the message

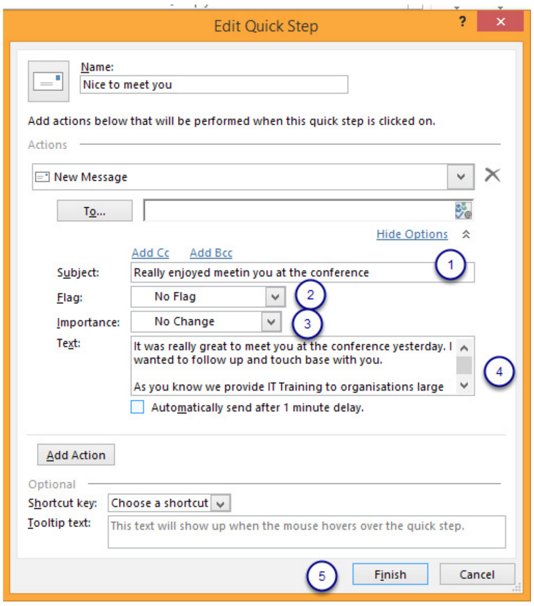


Figure 106 – fill in the details

6. Type a subject line
7. Choose a flag
8. Choose Importance
9. Type the message in the Text box
10. Click Finish

8.2.2 Launch the new message

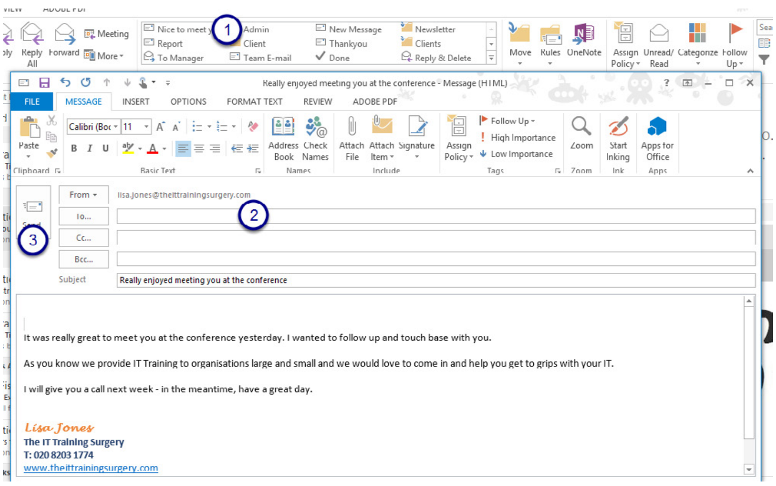


Figure 107 – use the new quickstep

1. Click on the QuickStep to launch it
2. A new email is set up ready for you to address and add any further personalised information
3. Click Send when you are done!

8.3 Reply and move

In this QuickStep you set up a reply to an email and move the email you are replying to into a folder.

8.4 Reply and move

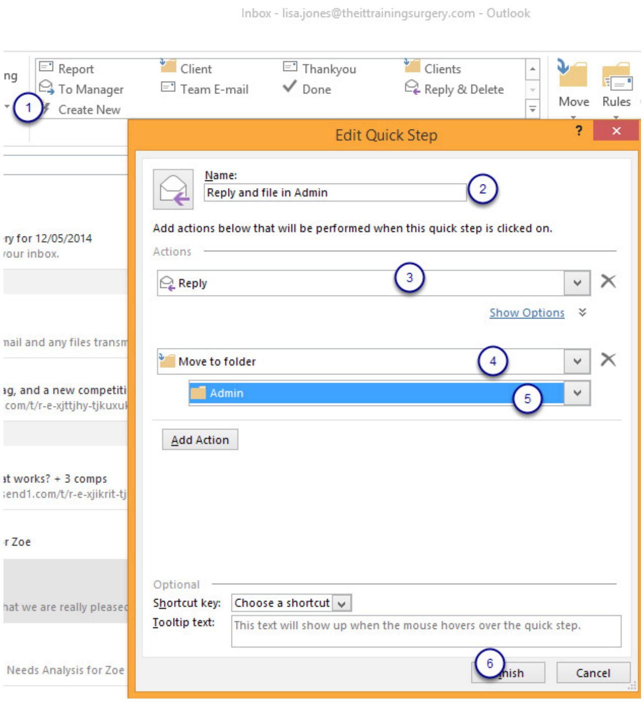


Figure 108 – reply and move to folder to file as you reply

1. Click Create New
2. Type a name for the QuickStep
3. Select an action – in this case Reply
4. Add another action – in this case Move to Folder
5. Select the folder
6. Click Finish

9 Email templates

9.1 Creating a template for email in Outlook 2013

This lesson shows you how to set up a template for email messages in Outlook 2013

9.1.1 Start a new email

Figure 109 – new email template

1. Click on the Home Ribbon
2. Click on New E-mail
3. In the message type the standard text

9.1.2 Save the message as a template

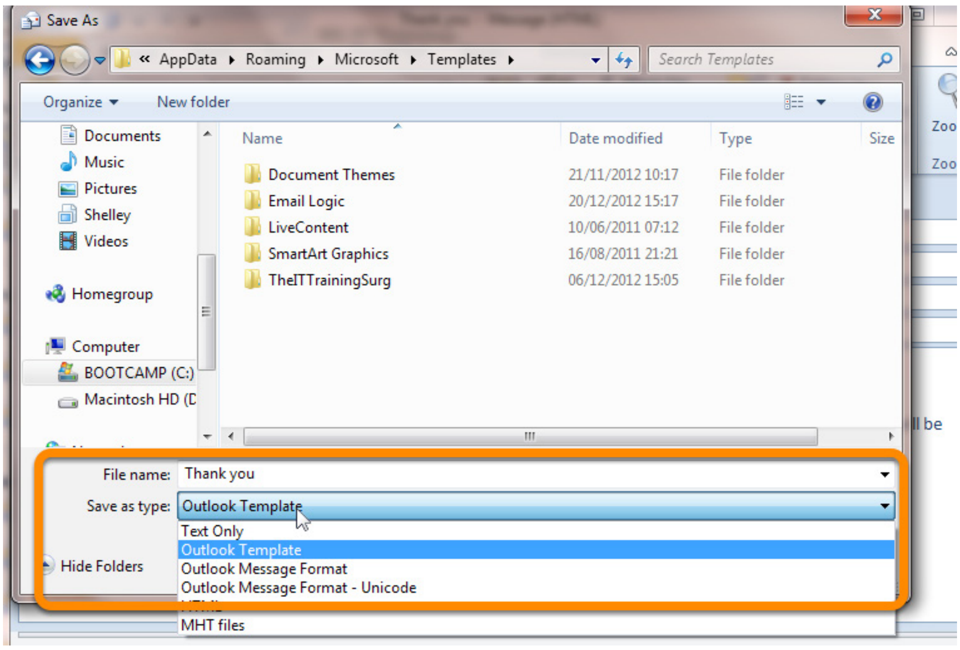


Figure 110 – save as Outlook Template

1. In the message window click the File tab
2. Select Save As
3. Then in the Save As dialogue box change the Save As Type to Outlook Template
4. Type a name in the File Name box (mine is called Thank you)

9.1.3 Where are templates saved?

Windows 8, Windows 7 and Windows Vista –
c:\users*username*\appdata\roaming\microsoft\templates

9.1.4 Send an email based on a template

Now you have a template you want to send an email with your standard text – here's how.

1. On the Home Ribbon click the drop down arrow below New Items

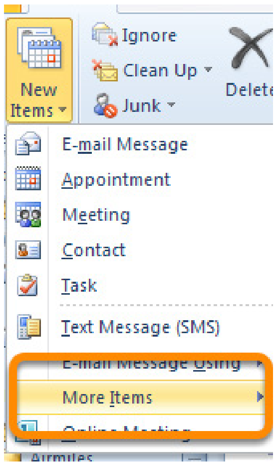


Figure 111 –semd new templated email

2. Click on More Items
3. Choose Use Form

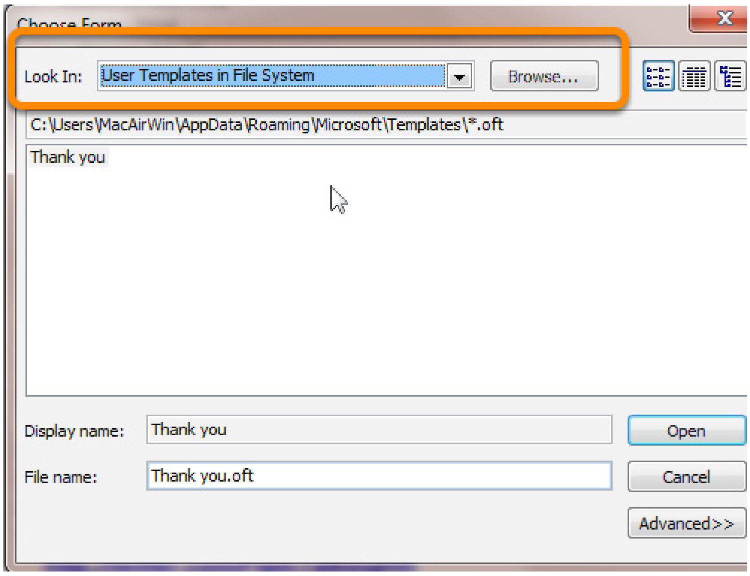


Figure 112 – choose the template frm the user templates in file system

4. Change the Look In location to User Templates in File System
   (If you saved your template anywhere other than the default location you can browse for it)
5. Select the template you want to use
6. Click Open
7. Make any changes to the email
8. Complete the To, CC and BCC fields and add any text that you want to add to the Subject or Body
9. Click Send!
   - Anything you add to the message will not be added to the template.
   - The Template remains unchanged so that you can use it again and again.
   - Create as many templates as you like for all kinds of regular communications.

9.2 Add the choose form icon to the Quick Access Toolbar

You have just created a shiny new template and you want to be able to get to it quickly. By adding the Forms Icon to the Quick Access Toolbar you can get to your template quickly and easily.

1. Add the Choose Form Icon
2. Click the drop down list next to the Quick Access Toolbar

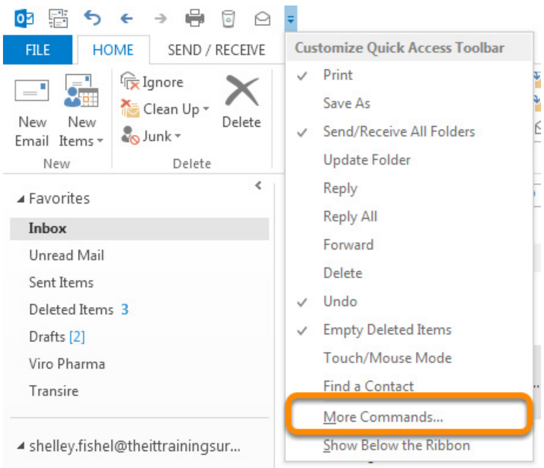


Figure 113 – add to the Quick Access Toolbar

3. Click the arrow on the right of the Quick Access Toolbar and select More Commands
4. Change the list to show All Commands

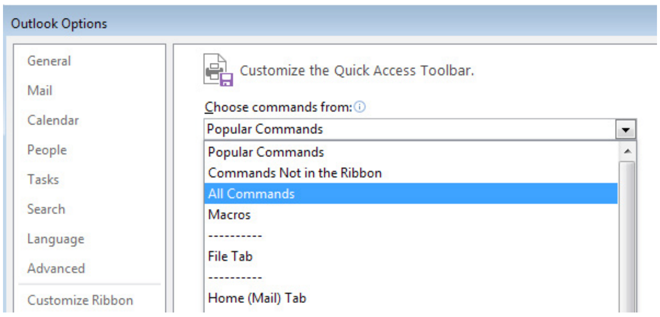


Figure 114 – Find the choose form icon in All Commands

5. Scroll down the list until you find the Choose Form Icon

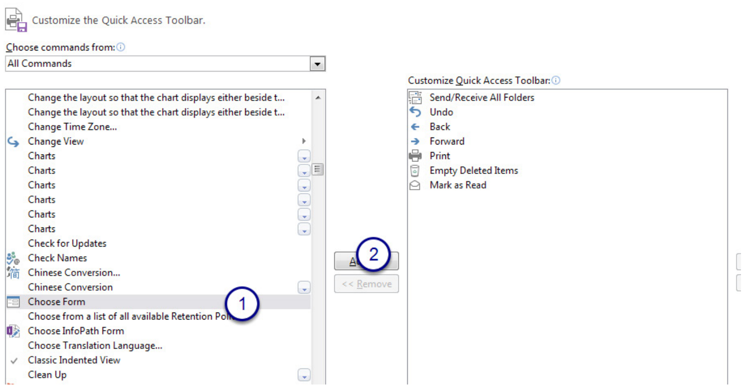


Figure 115 – select and click add

6. (1.) Click on Choose Form and then click (2.) Add to add it to the Quick Access Toolbar

9.2.1 To use your new email template

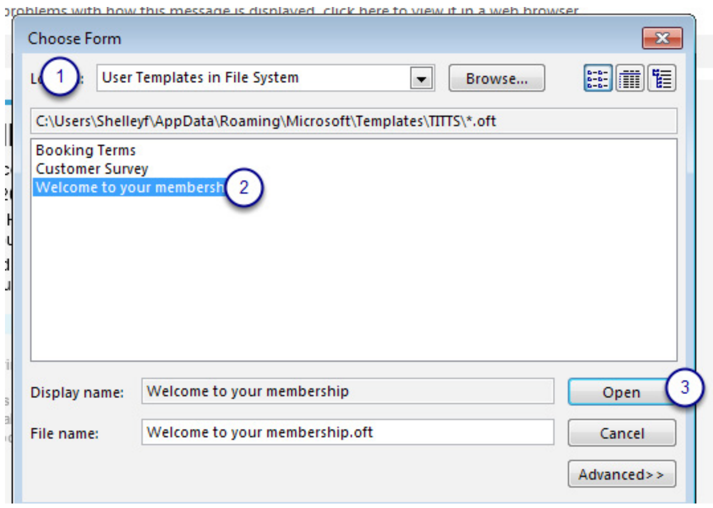


Figure 116 – use the new template

1. Click on the Choose form Icon
2. Change the Look In box to show User Templates in File System
3. Select your template
4. Click Open

Away you go!

10 Search

10.1 Search for email

I am sure you have been in the position whereby you need to find an email from a particular person or an email that matches a particular criteria or perhaps you just can't remember where you filed it.

10.1.1 The Search Ribbon

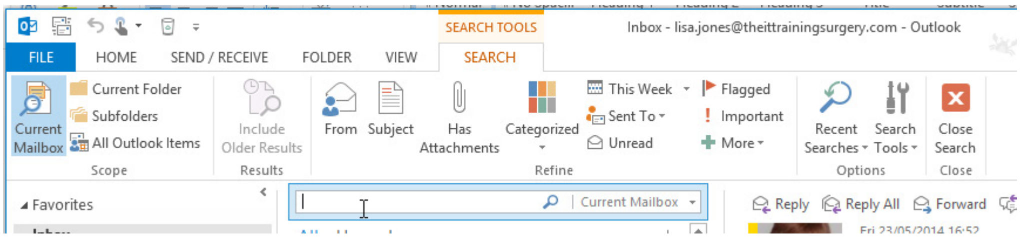


Figure 117 –the Search Ribbon

Click into the Search bar at the top of the inbox (or any folder you happen to be in) and the Search Ribbon appears

10.1.2 Find

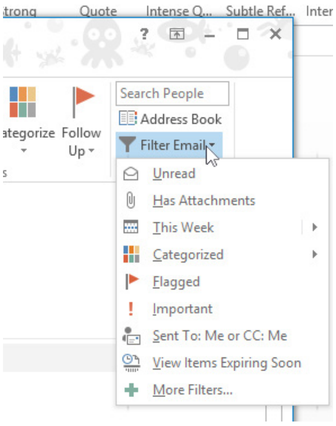


Figure 118 – the Find or Filter icon

Another way to search is to use the Find Icon which is located on the far right of the Home Ribbon. Here you can select the criteria to match.

10.1.3 Search criteria

When you filter or search, you tell Outlook what to look for.

- **Unread** – finds all messages that have not yet been read,
- **Has Attachments** – finds all messages that have attachments.
- **This Week** – set the date range in which to search.
- **Categorised** – find messages that have a particular category.
- **Flagged** – find flagged messages.
- **Important** – find messages marked important.
- **Sent To: Me or CC: Me** – finds messages where my(your) name is in the sent to or cc to box.
- **View Items Expiring Soon** – this filters out any items that have an expiry date set.

10.1.3 Find items from

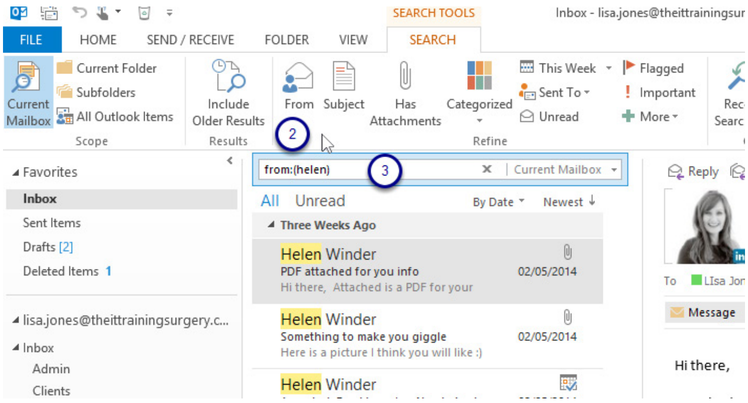


Figure 119 – find all email from

1. Click into the search box
2. Click on From in the Search Ribbon
3. Type the name of the person whose email you want to find
4. Press Enter

All email that match the criteria are displayed with the criteria highlighted in yellow

10.1.4 Has attachments

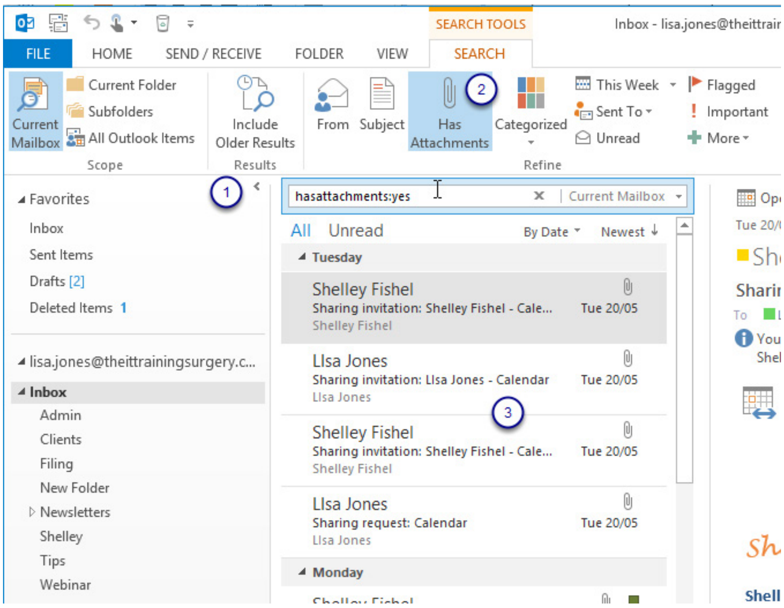


Figure 120 – find all email with attachments

1. Click into the search box
2. Click on Has Attachments
3. Press Enter

A list of email with attachments is now displayed

11 Search folders

11.1 Search folders

Is there a particular search that you perform several times a day? Do you always need to find email from a particular contact and that email might be saved in any one of several folders?

A Search Folder will help with either of those scenarios.

A Search Folder is a folder that holds all emails that match the criteria no matter which folder they are stored in. It is kept up to date all the time and if you delete the Search Folder, you keep the email as the emails are not stored in the folder itself – they are simply referenced or fetched each time you go into the folder.

11.1.1 Where are search folders?

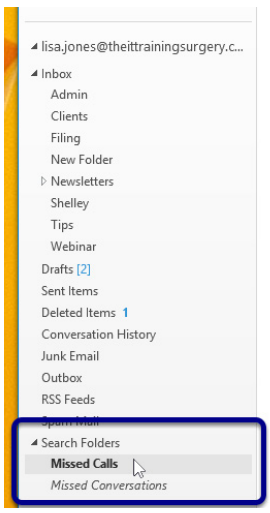


Figure 121 – search folders

Search folders live in the Navigation Pane and are created in the Inbox and at the same level as the Inbox.

11.1.2 Create a search folder

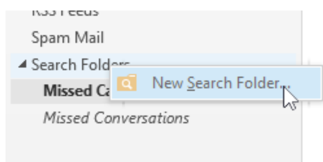


Figure 122 – craete your own search folder

1. Right Click on Search Folders and then click on New Search Folder
2. Start to set criteria

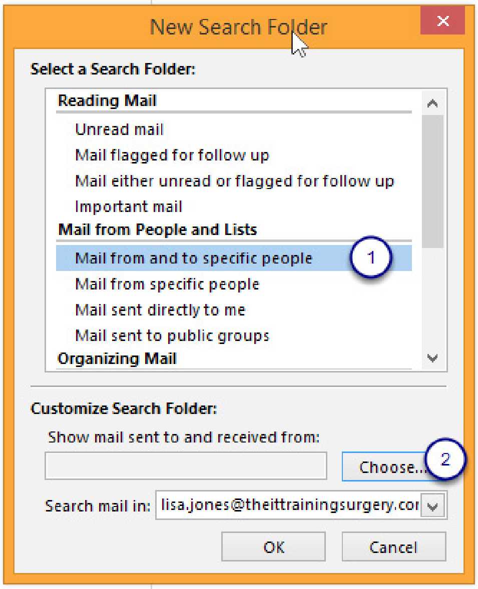


Figure 123 – set search foldre criteria

3. Select the type of Search Folder to start from – in my example I have chosen to find all email that has been sent to or from a particular person.
4. Click Choose
5. Select the contact from the address book or type it in

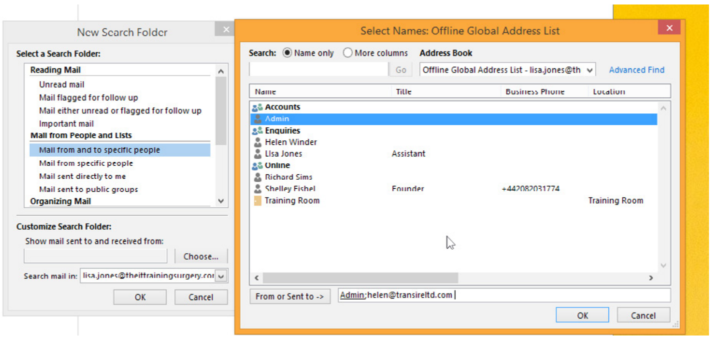


Figure 124 – type the email address of the person to find them in the address book

In this example, I have double clicked on Admin from the list to find all email from Admin and I have also typed in an email address for Helen as I would like to find all email to and from Helen as well.

6. Click OK twice to get back

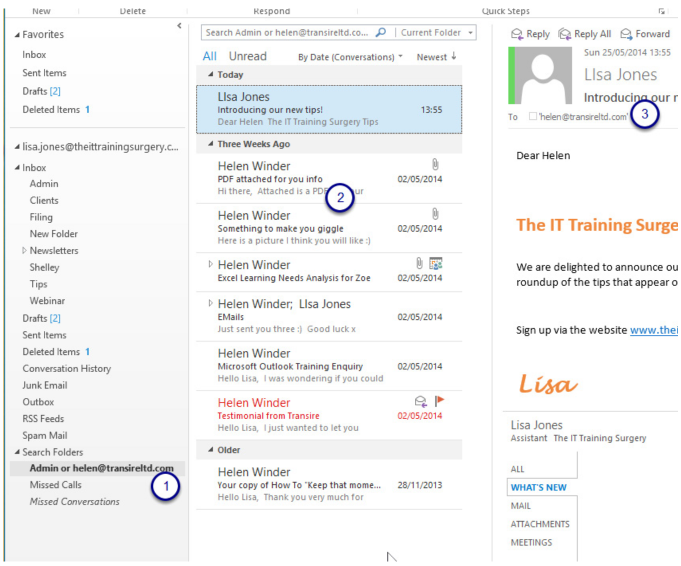


Figure 125 – search folder always up to date

7. The new Search Folder is listed in the Navigation Pane
8. All the emails in the list are either to or from the contacts I specified – i.e. Helen or Admin
9. I can see that the email selected was addressed to Helen at the email address I specified.

12 Calendar

12.1 The Calendar

When we are at work we will spend a large amount of time in the Calendar part of Outlook. Here are a number of lessons to get you working with the Calendar in ways you may not have thought possible.

12.2 Calendar views and arrangements

See the calendar in different ways depending on what you need to achieve.

12.2.1 Four views

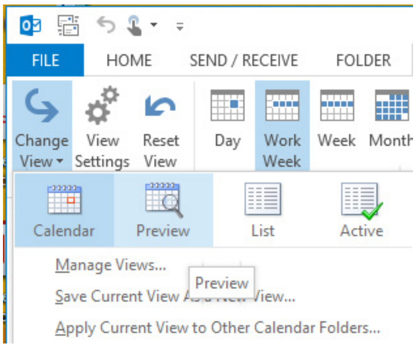


Figure 126 – calendar views

Calendar – see the standard view where you can see the calendar in the Day, Week, Work Week, Month or Schedule View.
Preview – in the Day, Week, Work Week arrangements, Preview view shows more information about appointments including information from the notes part of the appointment – space permitting.
List – This view displays all appointments meetings and events in your calendar as a list
Active – This shows all future active appointments events and meetings.

When you work in List view you can group calendar items by selecting a field.

12.2.2 Arrangements

Calendar arrangements are how you display the calendar when in Calendar View.

Day – show only appointments, events and meetings for one day.
Week – show appointments, events and meetings for a whole week, including the weekend.
Work Week – show appointments, events and meetings for the week – Monday to Friday (exclude weekends).
Month – show a whole month of your calendar.
Schedule View – This view shows a horizontal arrangement of the timeline and is useful for comparing time periods for multiple calendars.

12.2.3 Change the arrangement

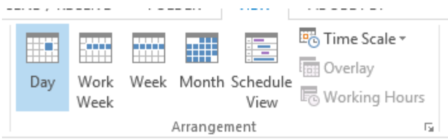


Figure 127 – calendar arrangement

Click the icon to display the calendar arrangement required.

12.2.4 Day view

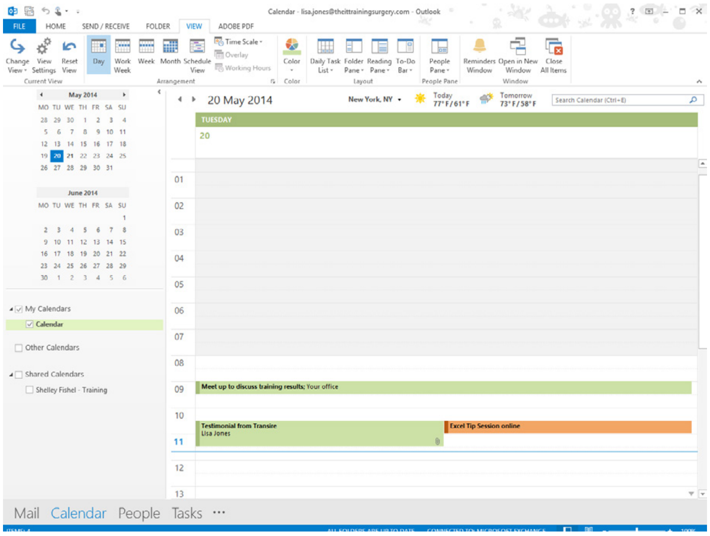


Figure 128 – day view

This view shows just what is on the calendar for the specified day.

12.2.5 Work week

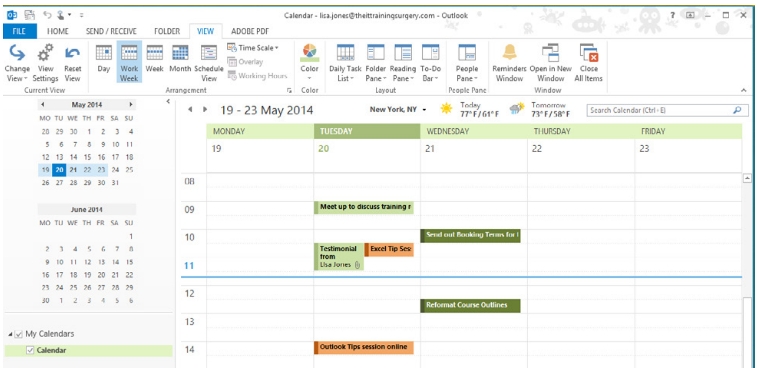


Figure 129 – work week

This arrangement show Monday to Friday only.

12.2.6 Week

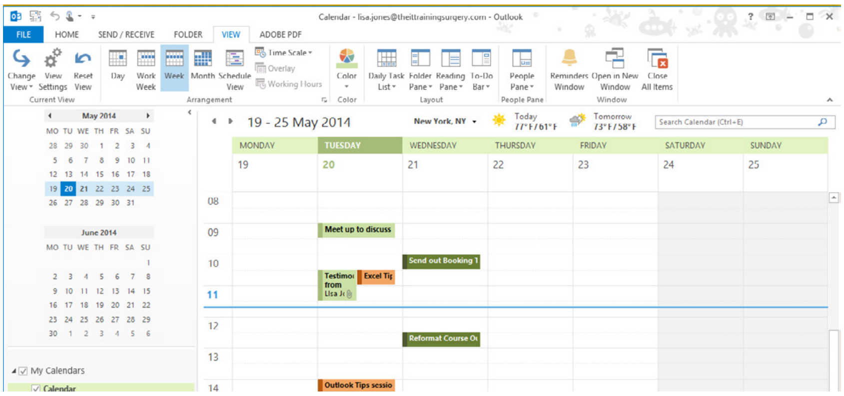


Figure 130 – week to view

See appointments for the whole week including Saturday and Sunday.

12.2.7 Month

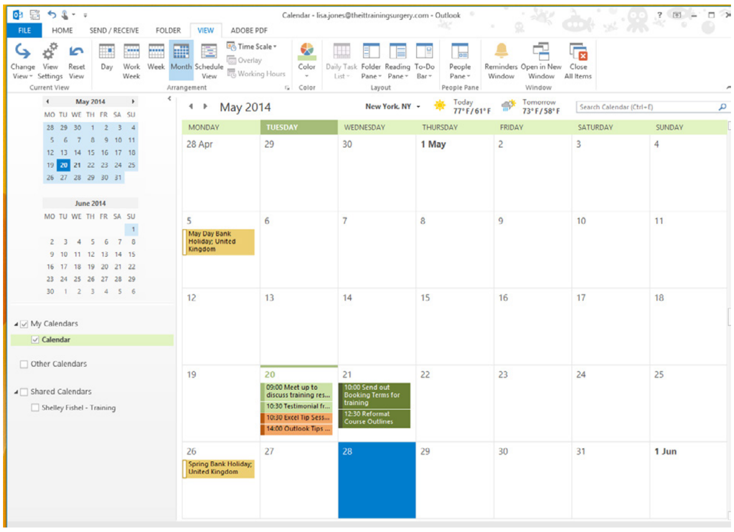


Figure 131 – view a month

Shows a whole month of appointments.

12.2.8 Schedule view

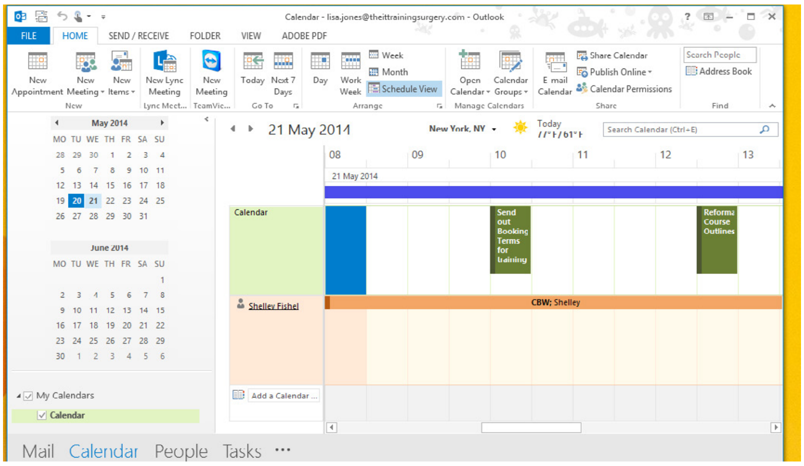


Figure 132 – view schedules for more than one person

See two or more calendars arranged in a timeline to see what is happening together.

12.3 Timescale

Use the Timescale to set how much time to display for each appointment on your calendar.

12.3.1 Timescale

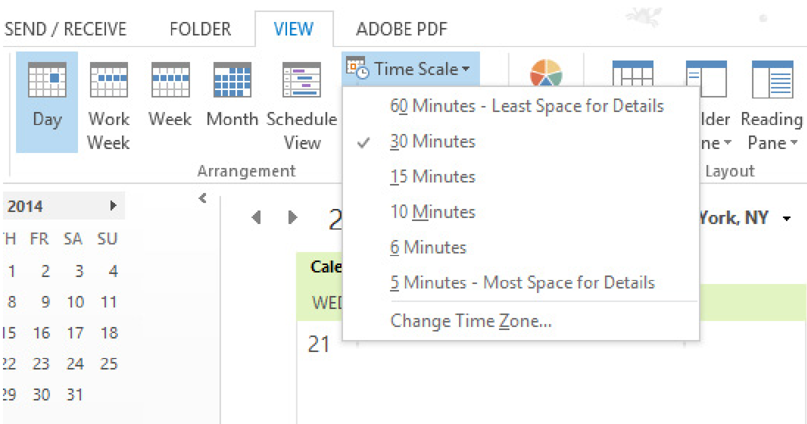


Figure 133 – set the timescale for appointments

The bigger the timescale the less space to show details.

12.4 Open other calendars

When working in an organisation, you may need access to other people's calendars. Once you have opened someone's calendar for the first time, it is very simple to switch it on to display or off to hide.

12.4.1 Open calendar

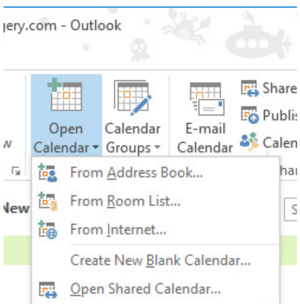


Figure 134 – open someone esles calendar

Click Open Calendar
Select the option you want to use

12.4.2 Open from Address Book

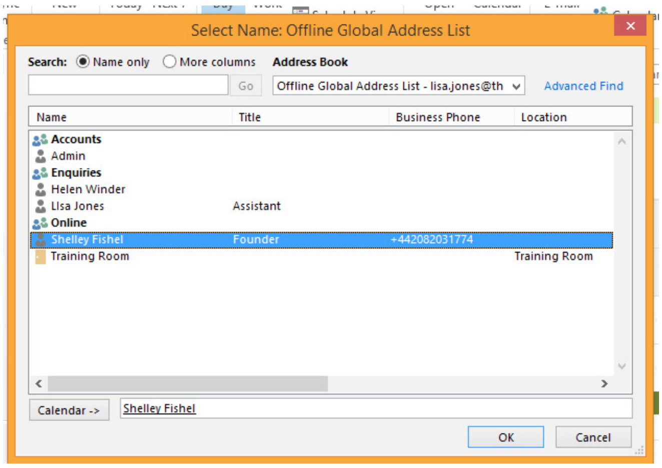


Figure 135 – find the calendar in your global address book

1. Click Open Calendar
2. Click on From Address Book
3. Select the person whose calendar you want to open – double click or click Calendar at the bottom
4. Click OK

12.4.3 Calendars open side by side

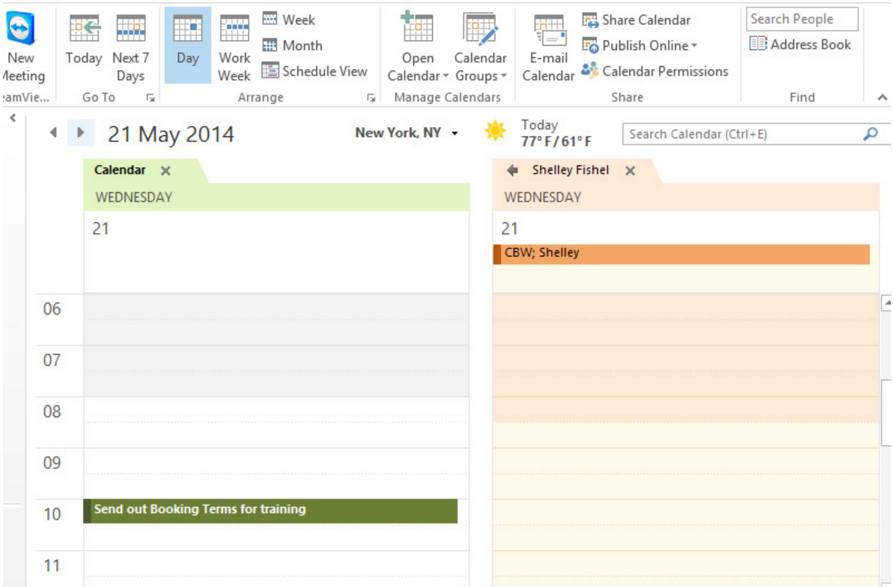


Figure 136 – see calendars side by side

The two calendars are displayed side by side.

12.4.4 Open from the Navigation Pane

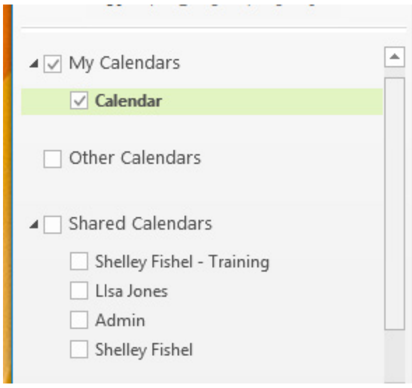


Figure 137 – select the calendar from the navigatino pane

Tick the box next to the calendar you want to open.

12.5 Share calendars

Within your organisation you can see everyone's free or busy time. However you may need to see more detail and you may also need to create or edit appointments in someone else's calendar.

12.5.1 Share your calendar

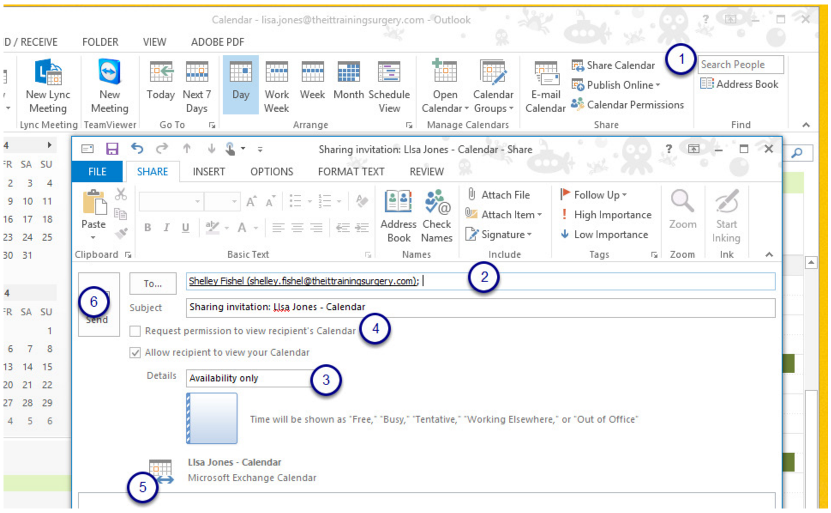


Figure 138 – share calendars

1. Click Share Calendar in the Share group on the Home Ribbon
2. Address the invite to the person with whom you want to share
3. Set the details level – availability only, limited details or full details
4. Tick the box request permission to view recipient's calendar (if you need to do this)
5. Type a message into the body of the invite (optional)
6. Click Send

12.5.2 Confirm sharing

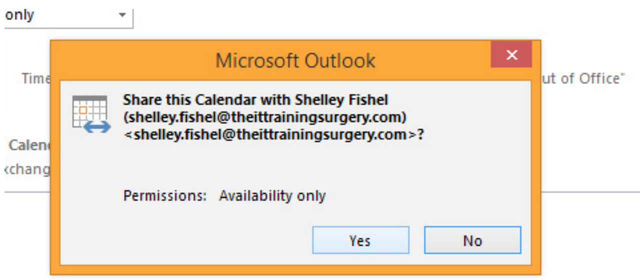


Figure 139 – confirm you want to share

7. Click yes to confirm that you do want to share this calendar.

12.5.3 Sharing invitation received

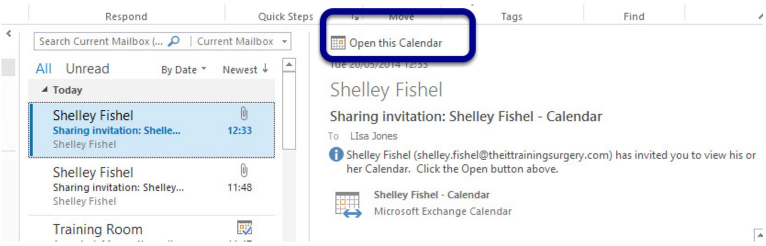


Figure 140 – Open the candar shared with you

An email invitation is received. The shared calendar can be opened directly from the email by clicking on Open this Calendar.

12.5.4 Calendar is placed in navigation pane

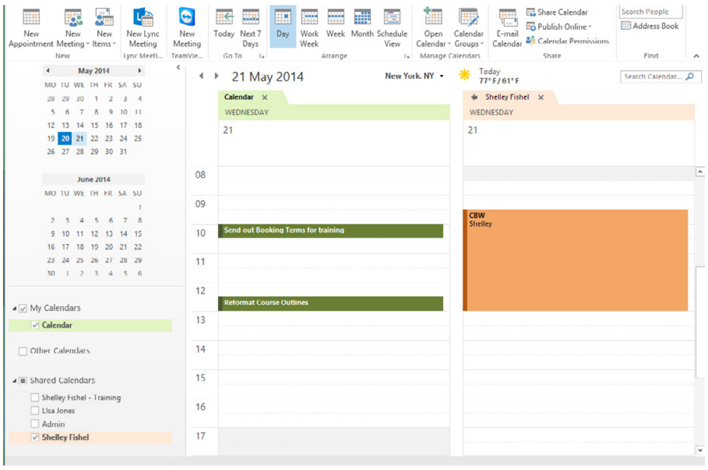


Figure 141 – open the calendar any time from the navigation pane

The shared calendar opens up and is displayed next to the default calendar. A tick box appears in the Navigation Pane which will allow you to show or hide the shared calendar whenever you want to.

12.6 Calendar overlay

Calendar overlay allows you to overlay one calendar on top of another. This makes looking for a time where all parties are free much easier. This is particularly useful if you want to compare more than three calendars as it can be difficult to see more than this side by side.

12.6.1 Overlay arrow

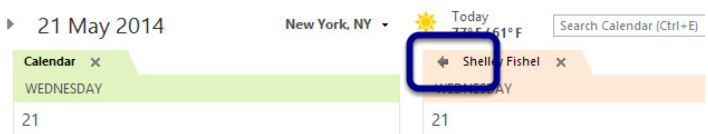


Figure 142 – overlay calendars

Click the Calendar Overlay arrow to overlay the selected calendar on top of the one to its left.

12.6.2 Calendars sit on top of each other

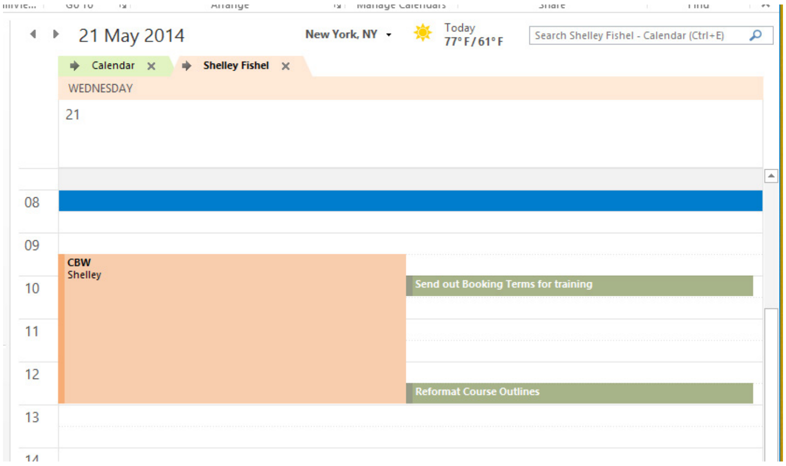


Figure 143 – see all appointments in one view

The two calendars now appear as if one is sitting on top of the other. The appointments show through so it is a simple exercise to see where there is a time when both people are free.

12.7 Calendar groups

Occasionally you need to open several calendars at the same time. Perhaps you are all part of a team. By creating a Calendar Group this can be accomplished with one click.

12.7.1 Create a calendar group

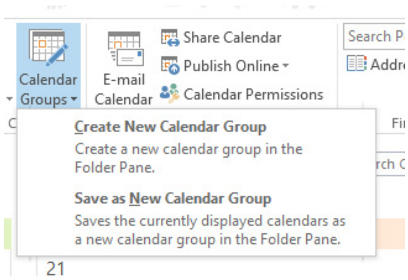


Figure 144 – create a calenda group

1. Choose to create a brand new Calendar Group or to save the currently displayed calendars as a new Calendar Group.

12.7.2 Name the calendar group

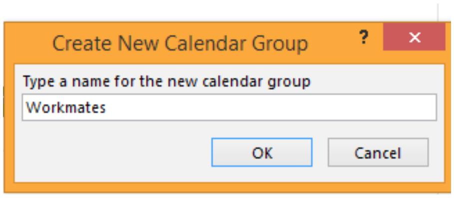


Figure 145 – name the group

2. Type a name for the calendar group
3. Click OK

12.7.3 Select group members

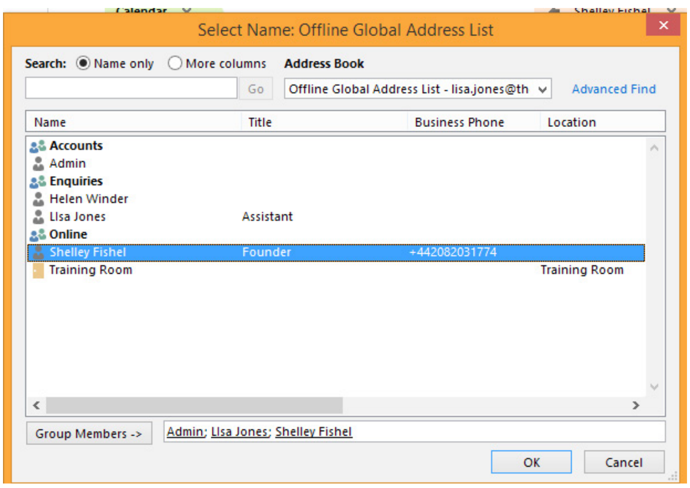


Figure 146 – choose group members

4. Double click on each of the names to include – they will appear in the Group Members area at the bottom.
5. Click OK

12.7.4 New group displayed

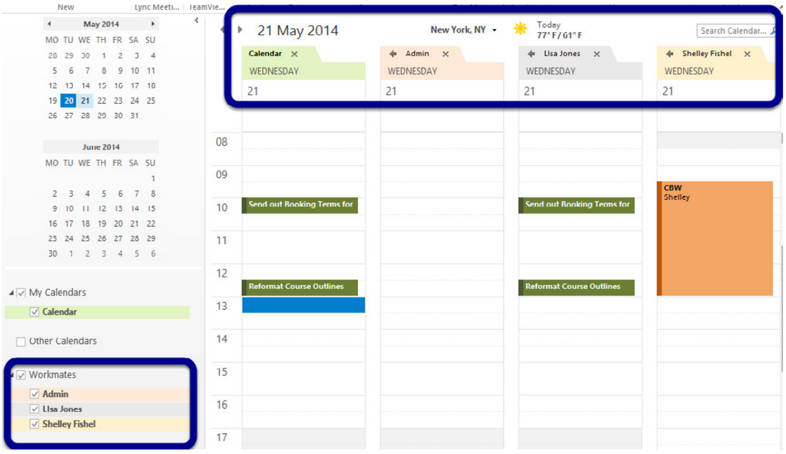


Figure 147 – new calendar group can be opened from the navigation pane

The new calendar group appears in the Navigation Pane with a tick box for the whole group and individual tick boxes for each calendar. This means that you can open all the calendars in the group in one go by ticking the group calendar name. Or you can open individual calendars by ticking each box individually.

12.7.5 Calendar group displays in schedule view

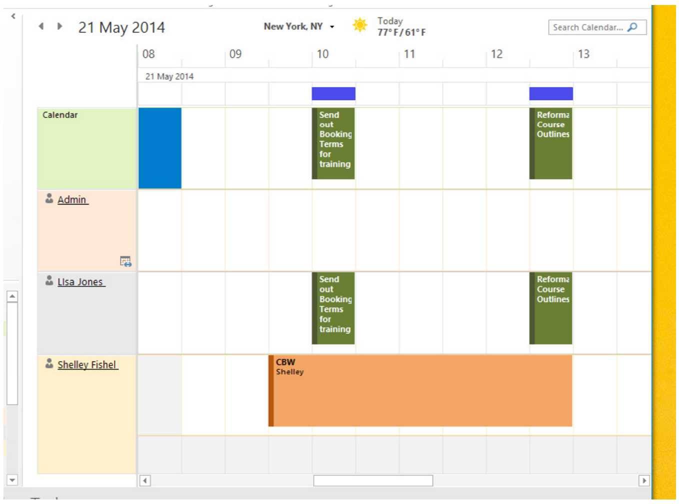


Figure 148 – see the calendars in schedule view

A Calendar Group will sometimes open in Schedule View. You can change the view by using the view icons in the Arrange group on the Home Ribbon.

12.8 Appointments

We have three types of appointments in Outlook.

Appointment – an appointment is between you and your calendar. It is not shared and is there for your information.

Meeting – once you invite someone along you have a meeting.

Event – this is an all-day event. Might be a birthday, anniversary or holiday and they appear along the top of the calendar without a start and end time.

12.8.1 Icons

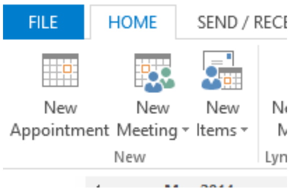


Figure 149 – create a new appointment

Any appointment can become a meeting by inviting people along. However there is no need for the extra clicks. Simply use a New Meeting request and you are all set.

An all-day event is a tick box on an appointment. Any appointment can be turned into an all-day event by ticking the box. When the box is ticked the start and end times are greyed out.

12.8.2 Create a new appointment

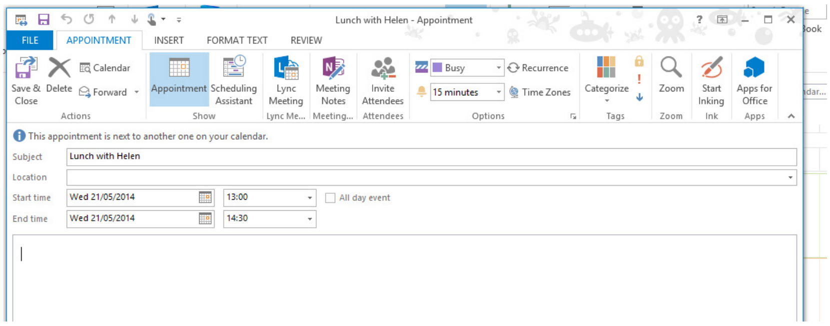


Figure 150 – new appointment

1. Click the New Appointment Icon
2. Fill in the subject of the appointment
3. Complete the date and time
4. Type any details in the body of the appointment
5. Click Save and Close when done

12.8.2 All day event

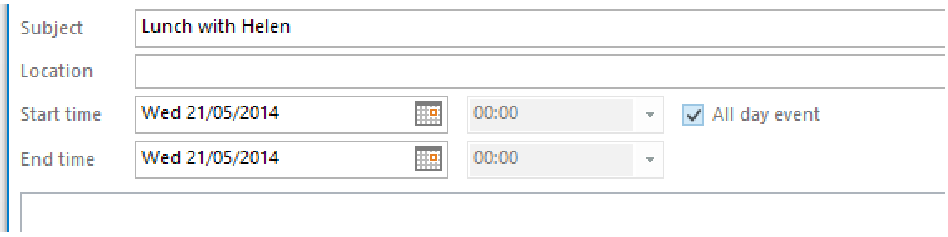


Figure 151 – tick the box to create an all day event

If this is an all-day event, tick the all-day event box. The timings will now be greyed out so that you can only select the date of the event.

12.9 Meetings

A meeting occurs when there is more than one person going. To speed things up use the New Meeting button.

12.9.1 Create a new meeting

1. Click New Meeting and a meeting request opens up ready to address

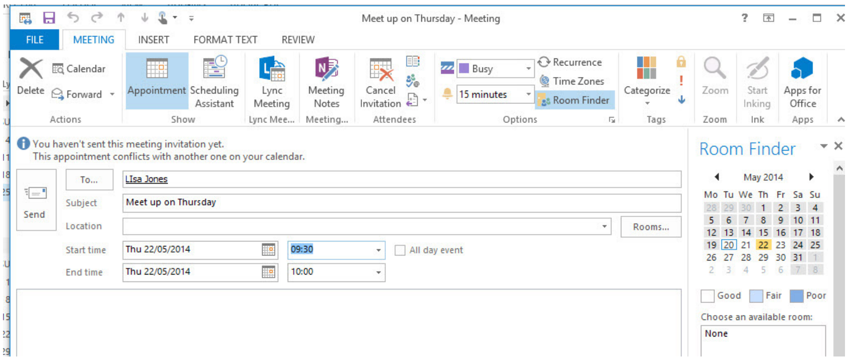


Figure 152 – create a new meeting

2. Type the email address of the invitee
3. Set the date and time
4. Click Send

12.9.2 Respond to the meeting request

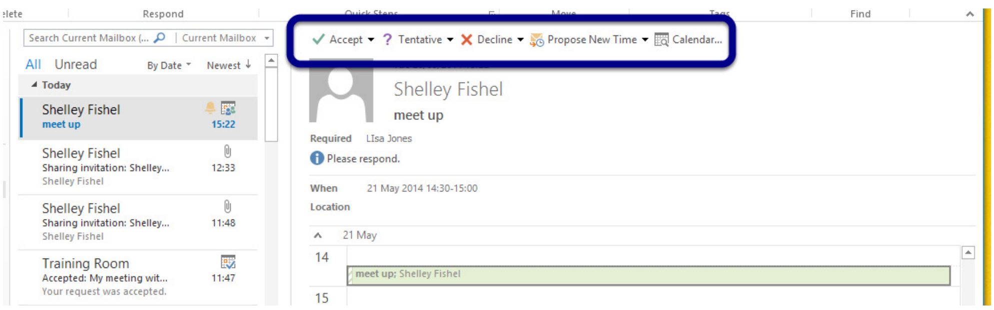


Figure 153 – accept or reect the invite

Click on the option you want to use.

12.10 The scheduling assistant

Use the scheduling assistant to see if the people you invite to your meeting are free – before you send out all the invites!

12.10.1 Set up the meeting

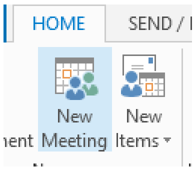


Figure 154 – scheduling assistatnt helps to book meetings

1. Click New Meeting

12.10.2 Add the invitees

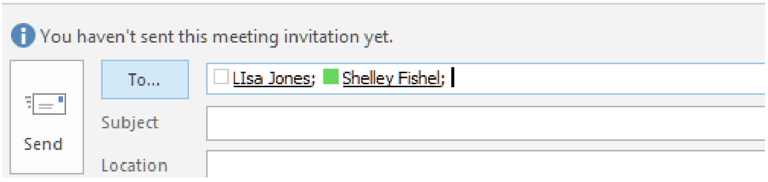


Figure 155 – add the people to the meeting

2. Type in the names or click the to: button and select from the address list

12.10.3 Click Scheduling Assistant

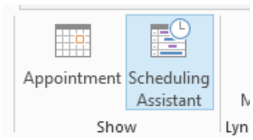


Figure 156 – click scheduling assistant to see everyone's diaries

3. Once you click Scheduling Assistant you can see who is free and who is busy

12.10.4 Free busy

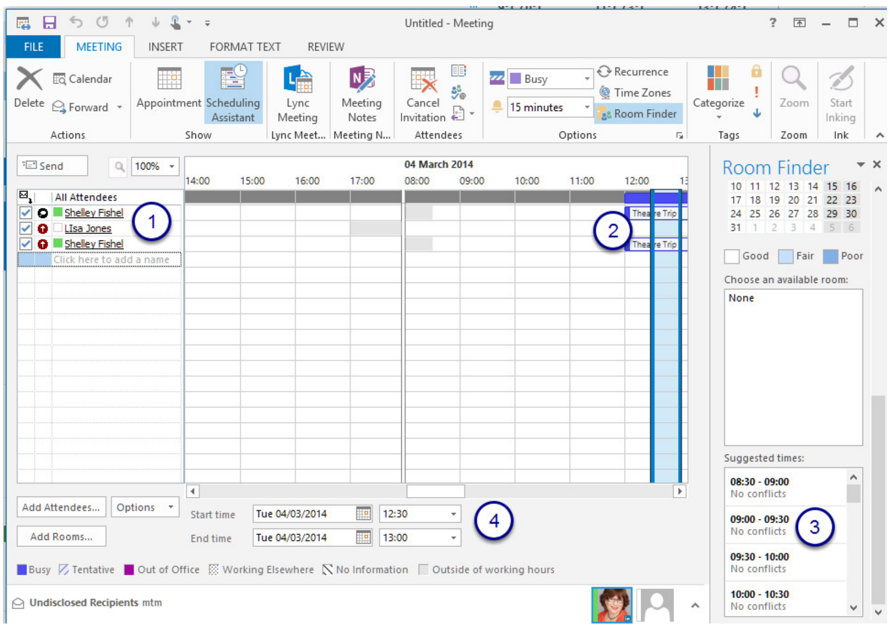


Figure 157 – see free and busy time

4. See who is invited
5. See if they are free/busy
6. Conflicts will be listed – along with time slots that do not conflict
7. Change the time and date of the meeting
8. When happy click Send

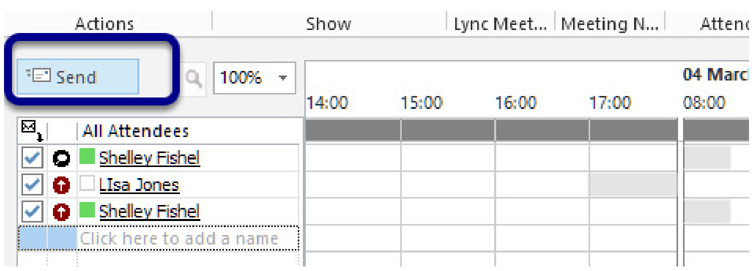


Figure 158 – send

9. Once you are happy with the details click Send

12.11 Tracking meeting responses

You have just invited 10 people to a meeting. They will all respond at different times. Now it gets to a couple of days before the meeting and you are getting prepared. First thing you want to know is who said they were coming and who said they were not. Instead of trawling through your inbox to find the responses you can track the responses in the Calendar.

12.11.1 Track meeting button

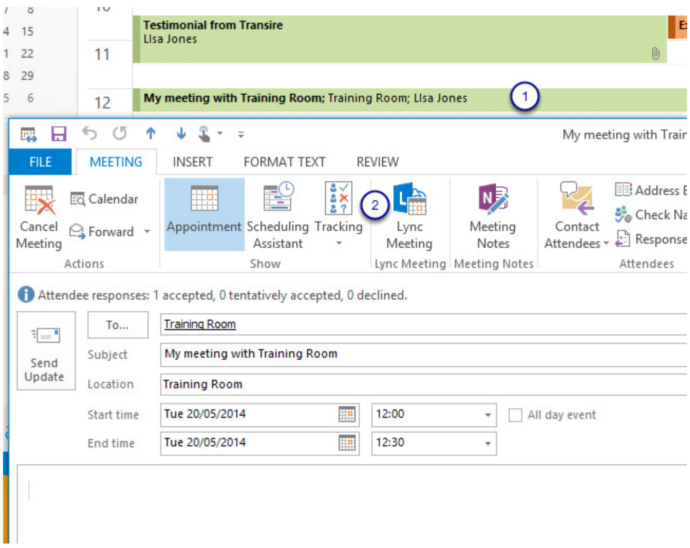


Figure 159 – track the meeting responses

1. Double click on the meeting in the Calendar
2. Click the Tracking Button

The Tracking button only appears to the meeting organiser.

12.11.2 See responses

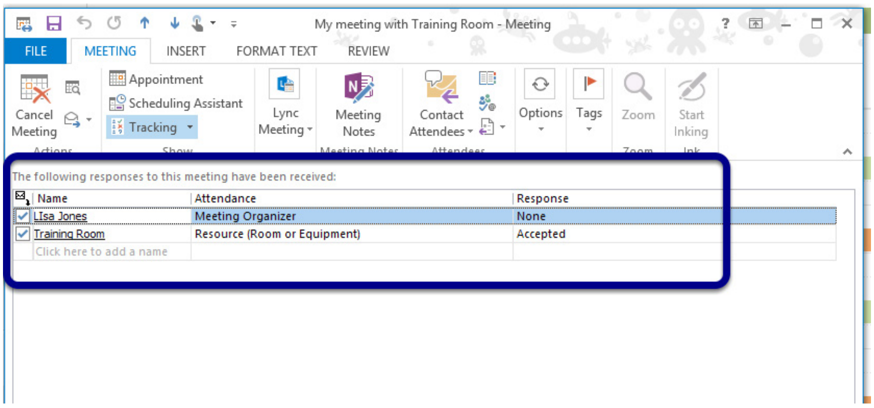


Figure 160 – see who is coming

Here you can see who said what and you can contact the attendees if you need to send them something about the meeting.

3. When you are done click the Appointment button and it will close the tracking view.

13 Contacts – people

13.1 Introduction

The People module of Outlook 2013 is where information about the contacts we interact with can be stored. Here you can keep information about individuals or companies such as their name and address details and communication methods such as telephone numbers, email address and Instant Messenger aliases.

Contact groups give you the ability to create a group of connected contacts with whom you can communicate easily all at once.

Those people with whom you communicate on a regular basis can be added to Favourites so that their details are available from everywhere within Outlook 2013.

Contact records are held in address books. You can create as many address book folders as you need. One for each type of contact.

13.2 View contacts

Navigate to the People section to view the contacts in your address book.

13.2.1 People

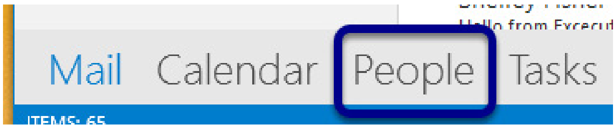


Figure 161 – the people module

Click the People shortcut to get to the Contacts area

13.2.2 The Contacts or People module

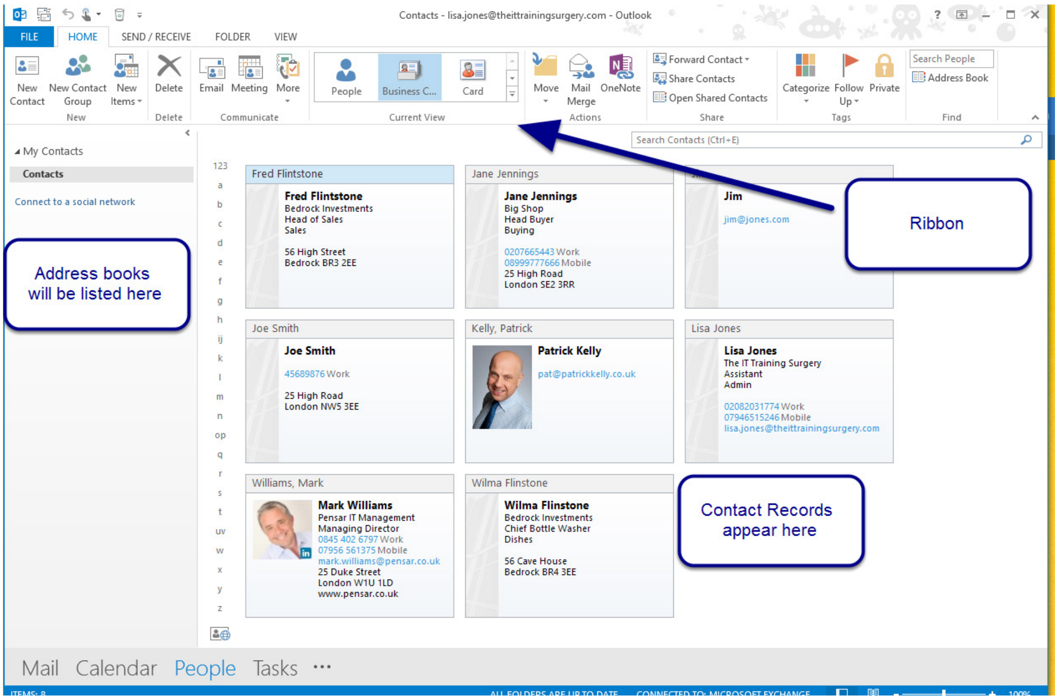


Figure 162 – see your contacts

Once in People as it is now called, you will see any address books that you have set up in the navigation pane on the left. By default there is one folder called Contacts which is the folder that Outlook sets up.

Contact records can be viewed in different ways to facilitate working with them.

13.3 Create a contact

13.3.1 Create new

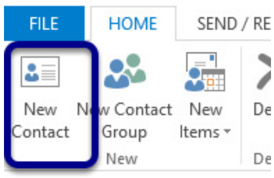


Figure 163 – create a new contact

On the Home Ribbon in the New group click on New Contact

Press Control + N to create a new contact with the keyboard when you are in the People module. When you are anywhere else within Outlook – press Control+Shift+C to create a new contact record.

13.3.2 Fill in contact details

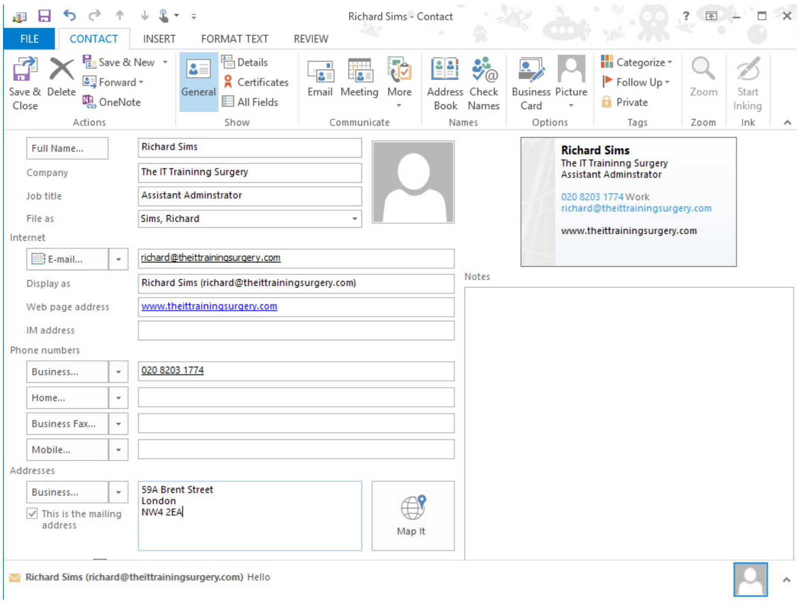


Figure 164 – complete the details

1. Complete the fields in the new contact record.
2. Click Save and Close when done.

13.4 Add contact details direct from incoming email

When you receive an email from a contact, you may want to see their contact details. If they are not in your address book already, you can add them directly from the email header.

13.4.1 Right click to add

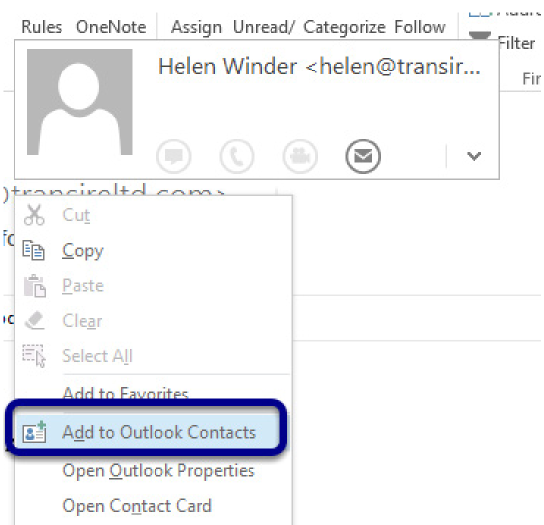


Figure 165 – add to contacts from email

To add details directly to Outlook Contacts

1. Right click
2. Select Add to Outlook Contacts

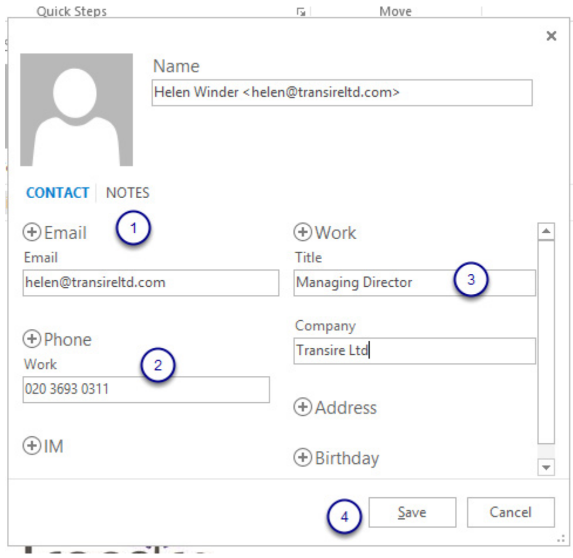


Figure 166 – complete the contact card

3. Email details are already completed
4. Add a telephone number – click the plus to expand and select Work, Home, Mobile
5. Complete the rest of the address details expanding the plus signs to add more information as needed
6. Click Save when done.

13.5 Communication options in the message header

You can communicate in different ways with your contacts via the message header.

Figure 167 – communicate direct from an emal header

When you have Microsoft Lync installed and running you can use its features to communicate with your contacts. Or you can simply send an email.

1. Start an instant message using Lync
2. Call the contact via Lync – you will need a provider account for this to work
3. Start a video meeting with your contact
4. Email the contact

13.6 Favourite people – peek

Add those people who you communicate with all the time to the Favourite People Peek.

13.6.1 Add to favourites

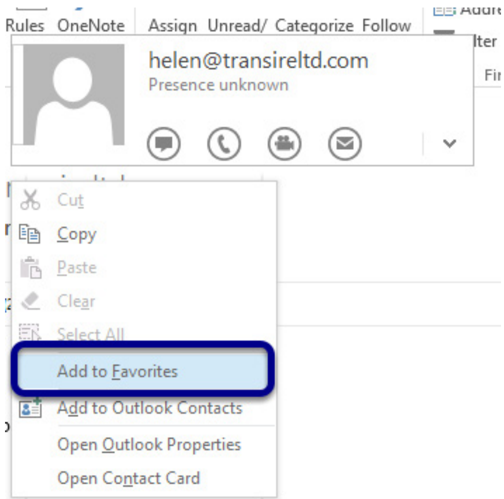


Figure 168 – add favourite people

Right click on the email address in the message header and select Add to Favourites.

13.6.2 Search and add to Favourites

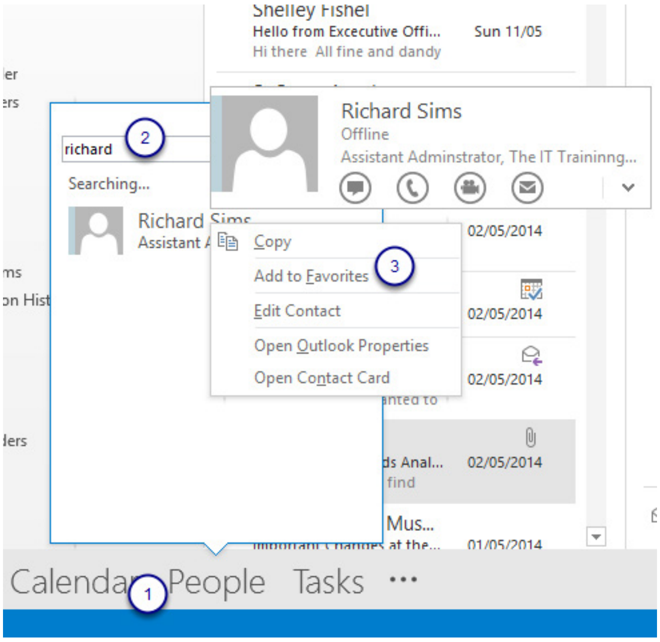


Figure 169 – find a contact and add to favourites

1. Hover over the People shortcut
2. Type the name of the contact to search for in the Search Box
3. Right click and select Add to Favourites

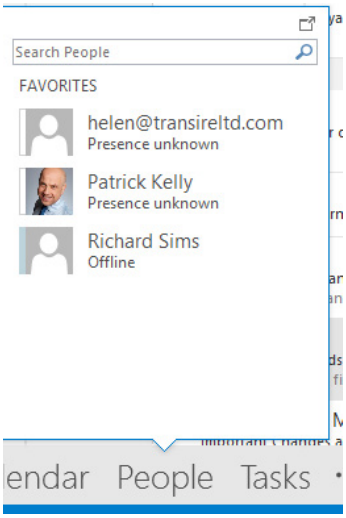


Figure 170 – new favourite added

See your new Favourite person!

13.7 Create a contact group

If you find yourself writing to a particular group of the same people all the time, you can create a contact group. Perhaps you are a member of a particular committee at work, or you orgnanise your kids football team either way you can create a Contact Group for that purpose.

13.7.1 Create contact group

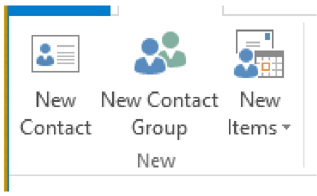


Figure 171 – create a contact group

1. In the New Group on the Home Ribbon click on New Contact Group

13.7.2 Name the group

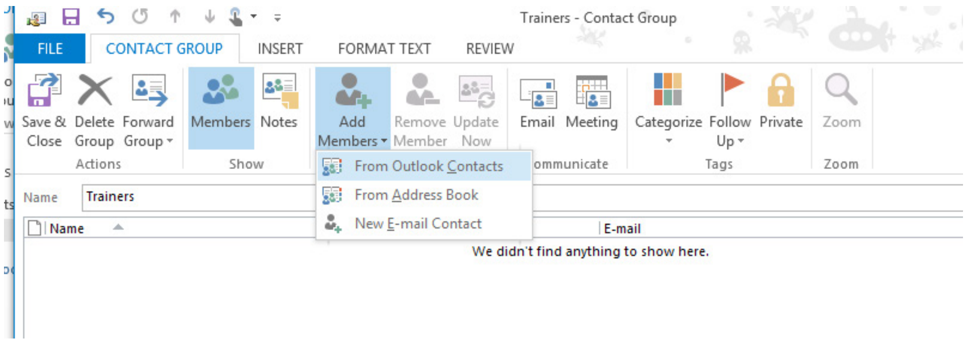


Figure 172 – name the group

2. Type a Name for the contact group
3. Click Add Members and choose where the members are coming from

From Outlook Contacts – select contacts from the default address book
From Address Book – this is your Global Address List – all those who work in your organisation
New Email Contact – if the contact is not in Outlook Contacts or the Global Address List you can type their address in here.

13.7.3 Select the contacts to add

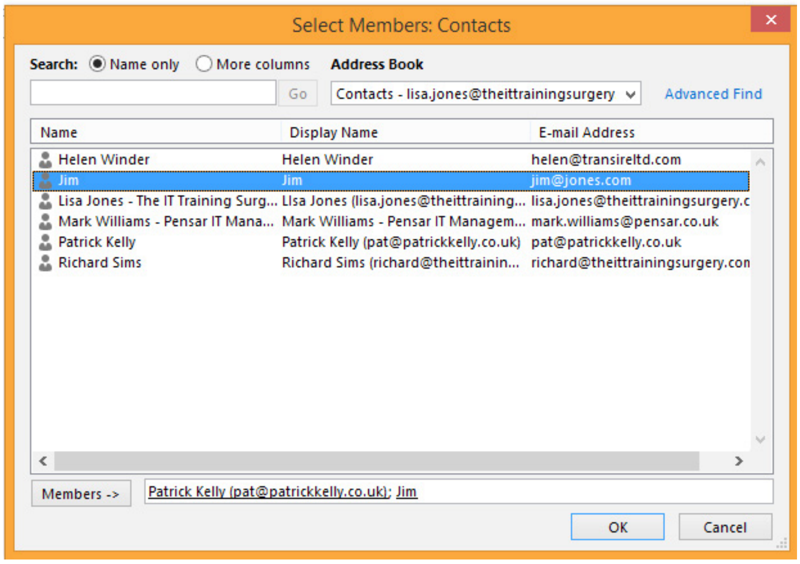


Figure 173 – choose group members

4. Double click on each contact to add and make sure they appear in the Members area
5. Click OK when done

13.7.4 See the group members

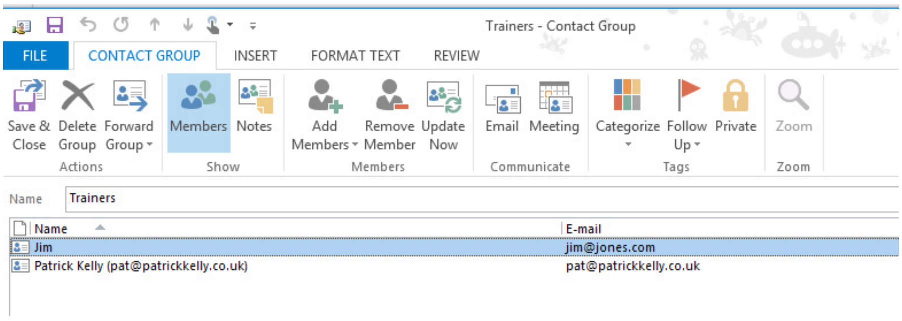


Figure 174 – see the list of members

6. When you are finished adding members click Save & Close to get back to Contacts.

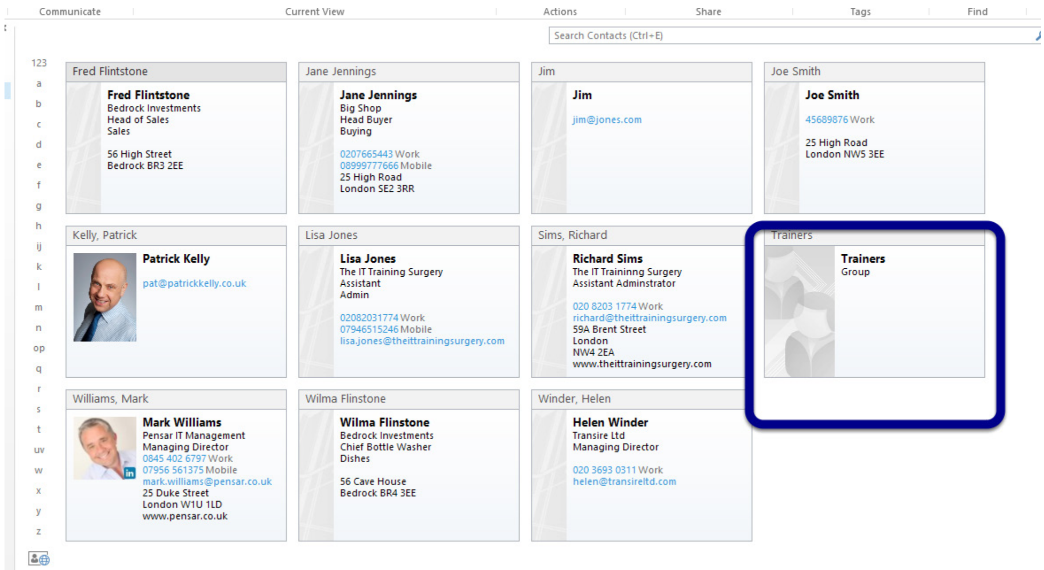


Figure 175 – see the contact group card

The new Contact Group is now in the contact list.

13.8 Email a contact group

When you want to email the people on your list there are a few ways to do so.

13.8.1 Address and email

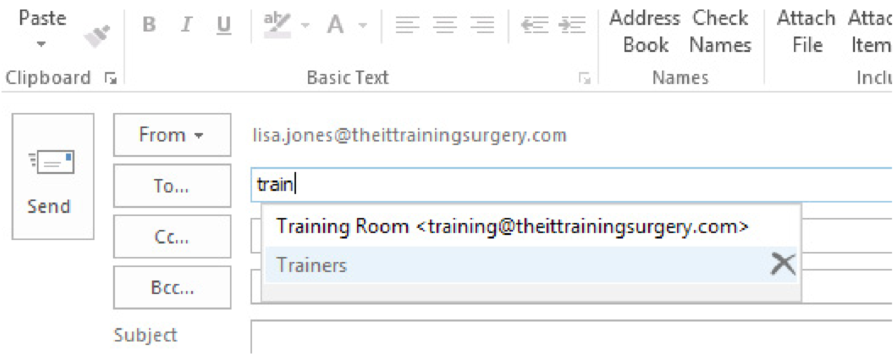


Figure 176 – email the contact group

1. In a new email, type the name of your Contact Group – Outlook will pick it up
2. Click on it to add

Figure 177 – group is collapsed

The group is added with a + sign – this allows you to expand the group and see the members email addresses individually.

If you do expand the group you cannot collapse them again.

Members of the group will be able to see each other's email addresses. If you don't want them to see everyone's email, put the group in the BCC field and address the email to yourself.

13.8.2 Email from the Contact Folder

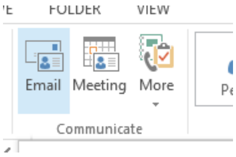


Figure 178 – send email from the contact folder

1. Click on the Contact Group to select it
2. Click on Email in the Communicate group

13.8.3 Email contact group from its record

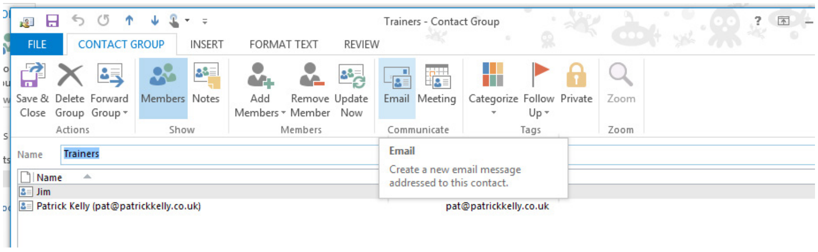


Figure 179 –send email from the contact group record

1. Open the Contact Group record
2. Click Email from the Communicate Group on the ribbon

13.9 Organise contacts in folders

Contact cards are stored in address books which are folders within Outlook. Outlook creates a default Contacts folder called Contacts. You can create more folders for specific categories or types of contact.

13.9.1 Create a new contact folder

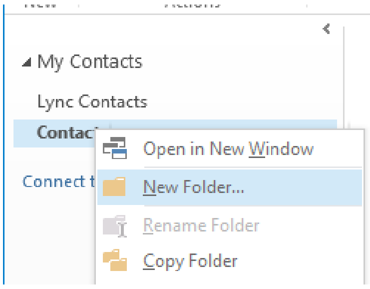


Figure 180 – craet a enw contact folder

1. Right Click on the Contacts folder and select New Folder

13.9.2 Name the folder

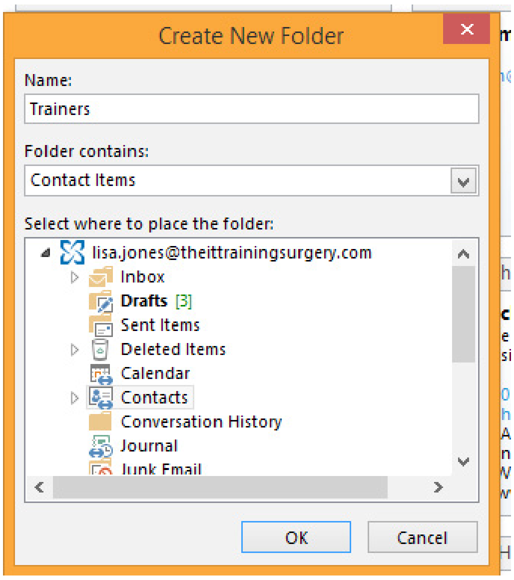


Figure 181 – name the folder

2. Type a name for the folder and specify what type of contents the folder will have, in our case Contact Items
3. Click OK

13.9.3 New folder created

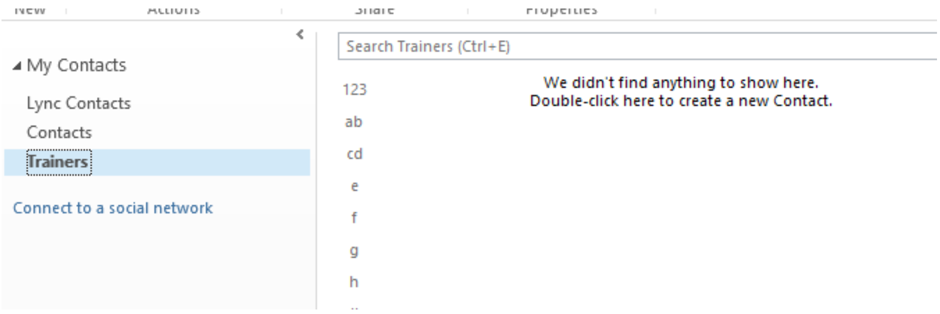


Figure 182 – here is the new folder in the navigation pane

We now have a new contact folder in the Navigation Pane although it does not have any contacts in it to begin with.

13.10 Place contacts in folders

Create new contacts in your new folder, by starting the process with the new folder selected.
Drag contacts from the default contact folder to the new folder to move them.
Hold down Control and drag a contact to copy it.

13.10.1 Create contact in new folder

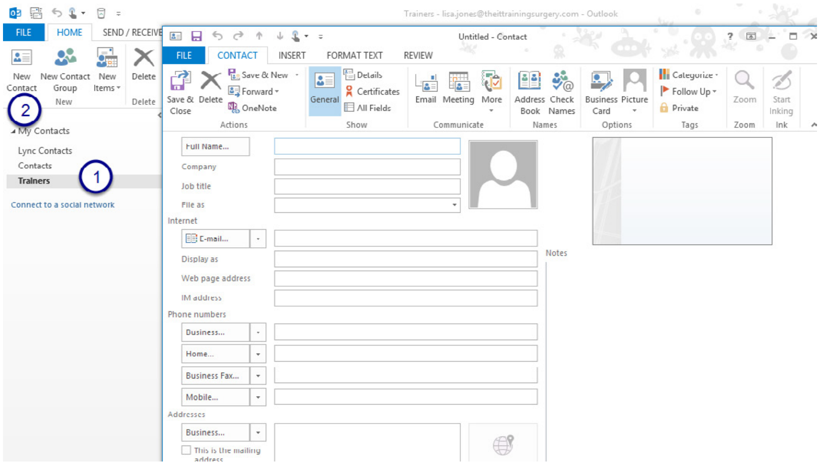


Figure 183 – create a new contact in the new folder

1. Click on the folder in the Navigation Pane
2. Click New Contact
3. Proceed as before

13.10.2 Move contact to folder

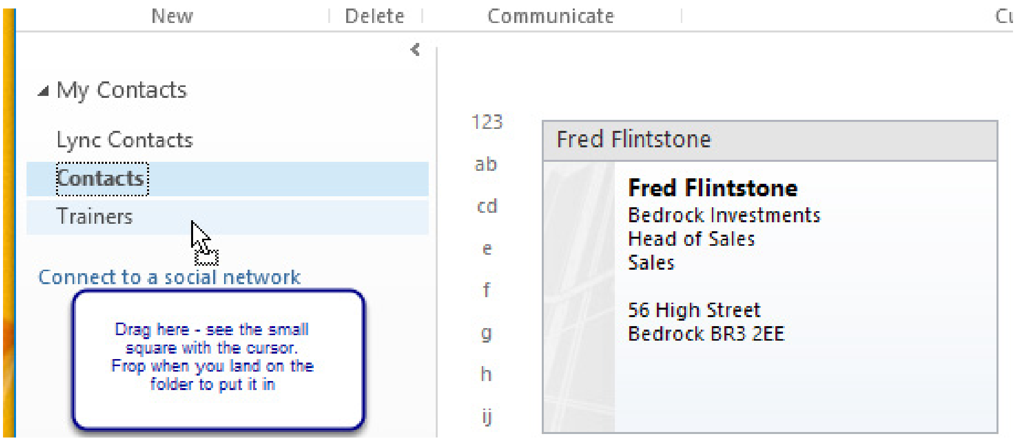


Figure 184 – move by dragging

Drag the contact you wish to move and drop it on the folder in the Navigation Pane.

13.10.3 Copy to contact folder

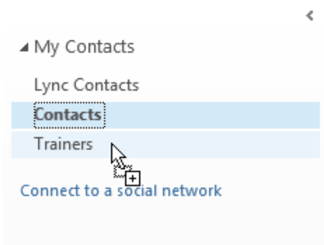


Figure 185 – Copy to a folder

Hold the Control Key as you drag – see the plus sign – this copies the contact to the new folder and leaves a copy behind in the original.

14 Connect to a social network

14.1 Social connector

If you work in Recruitment, you will most likely spend some of your time on Linked In. This may also be the case if you are job hunting or if you simply want to keep up with what your contacts are doing.

Outlook 2013 allows you to connect to Linked In which brings details of updates directly into your inbox in a Social pane at the bottom of your email. It is also possible to connect your Facebook account and see updates here too.

14.1.1 The social connector

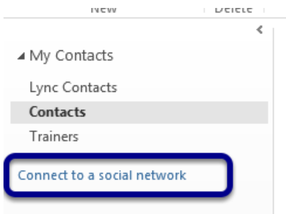


Figure 186 – connect to social networks

1. From the Navigation Pane in Contacts click on Connect to a social network.

14.1.2 Follow the wizard

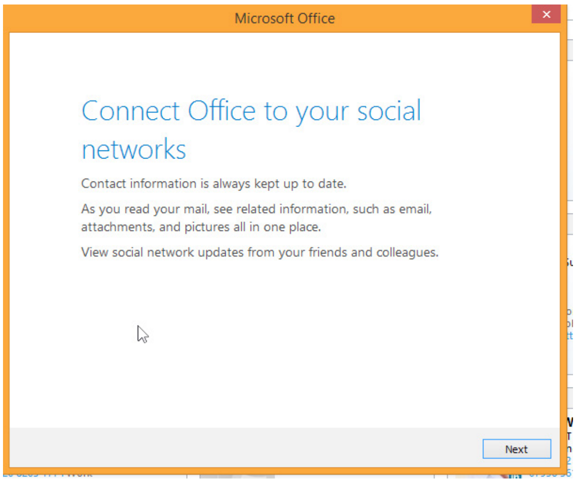


Figure 187 – the step by step wizard

2. Read the screens that come up and click Next.

14.1.3 Select the networks to connect

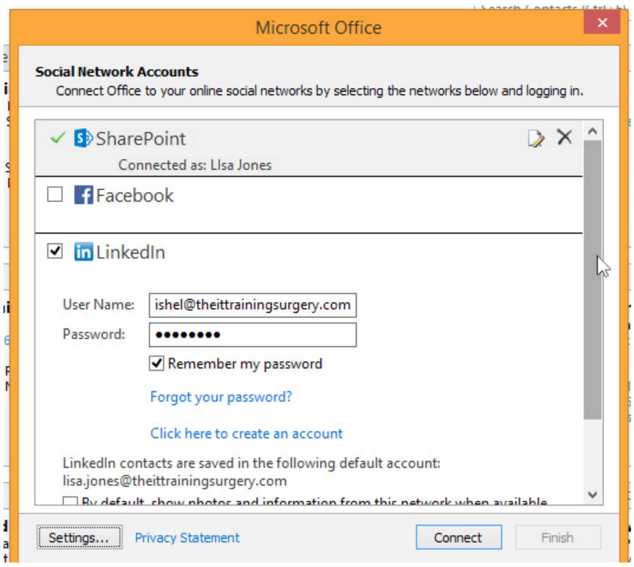


Figure 188 – choose the networks to connect to

3. Fill in the log in details for each network you want to connect to
4. Click Connect

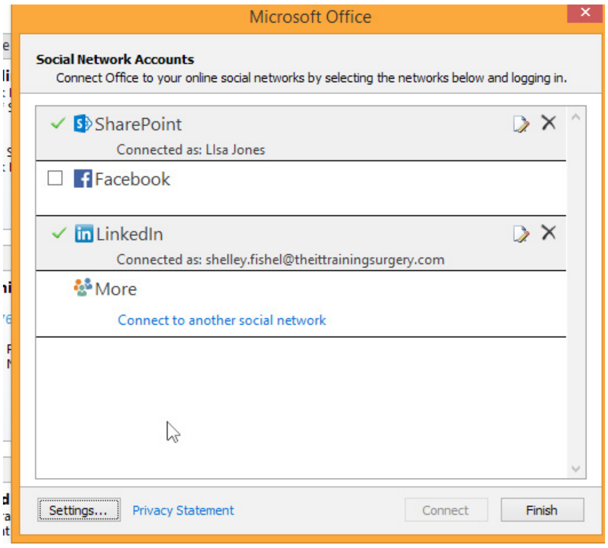


Figure 189 – complete the log in details

The connector will send the log in details and they will be checked. If they match up you will see the screen above.

5. Click Finish

14.1.4 Congratulations

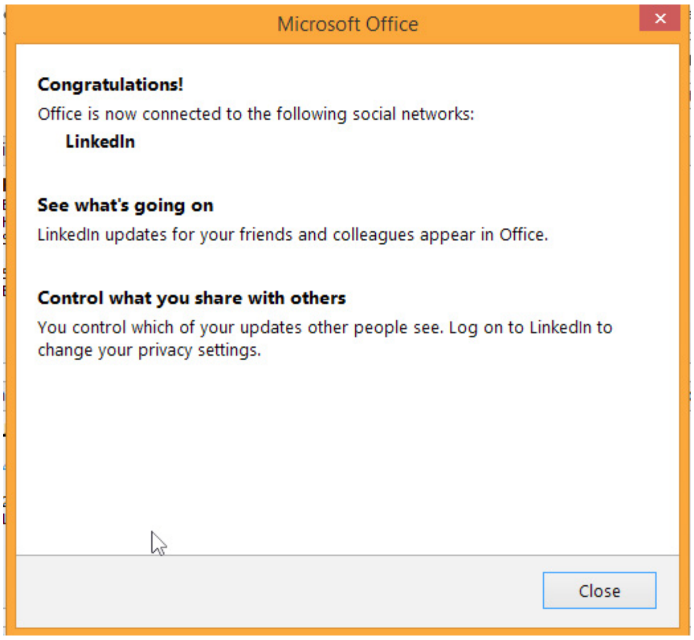


Figure 190 – that's it you are now connected

You are now connected

14.1.5 See Linked In Contacts

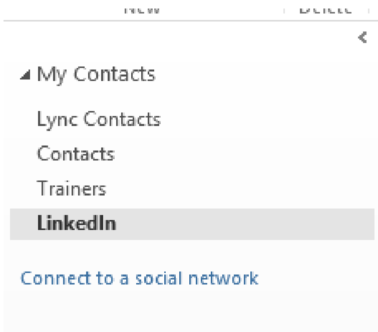


Figure 191 –new contact folder created

A new address book has been created to hold all my Linked In Contacts. It works just like a regular address book.

14.1.6 Information shows up in the People Pane

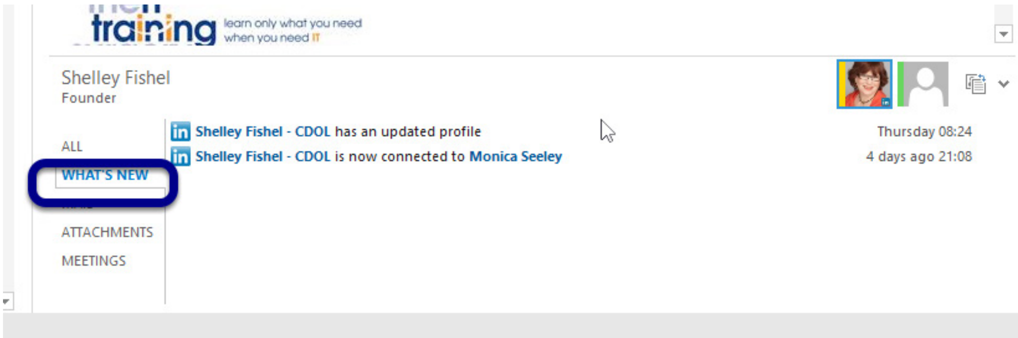


Figure 192 – see information about a contact's social activity in the people pane

14.2 The people pane

The people pane can be displayed so that you can see what is going on with the people you email. It is handy as you can see the history of email with them and also if you are connected to a social network, this is where you see the updates.

14.2.1 Show the people pane

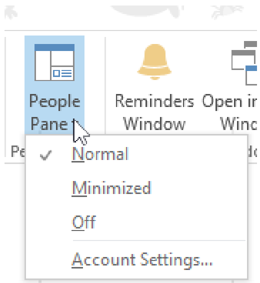


Figure 193 – turn on the people pane

1. On the View Ribbon
2. Click below People Pane and select how you want to see it.

14.2.2 All interactions

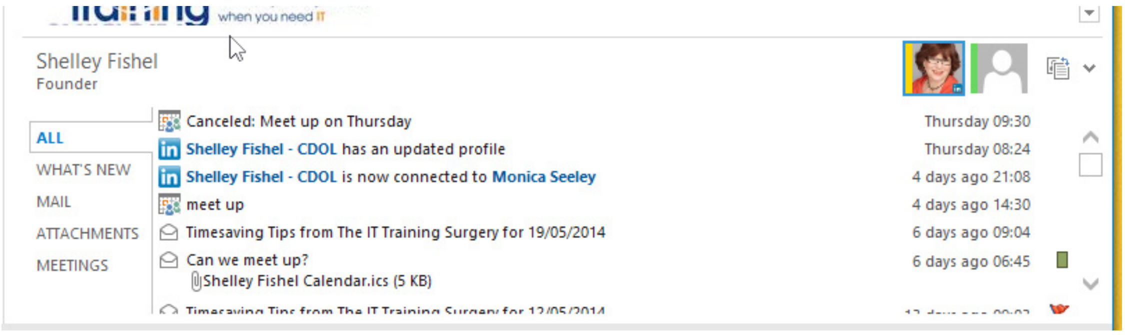


Figure 194 – see all interactions in one place

The People Pane has five sections.

- **All** – this shows a summary of all communication with that contact.
- **What's New** – this is where any new updates from social networks such as LinkedIn or Facebook will show.
- **Mail** – here you will see a list of previous email.
- **Attachments** – any email that have attachments will be listed here.
- **Meetings** – any meeting you have scheduled with this contact will show here.

14.2.3 What's new

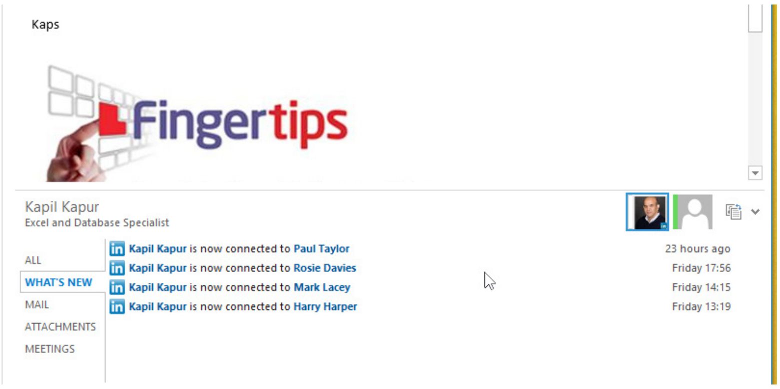


Figure 195 – see only new interactions

Here I have an email I received from Kapil Kapur who is an Excel and Database specialist. I can keep up with all his new activity on Linked In!

To go to LinkedIn and see Kapil's profile, I can click the blue link.

14.2.4 Go to Linked In

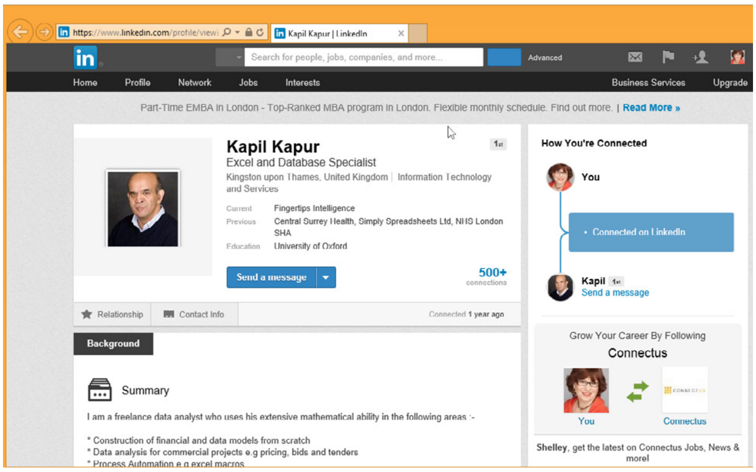


Figure 196 – go to their profile from your email

I get straight to Kapil's profile to see what he may have updated.

14.2.5 Mail

Figure 197 – see a list of recent email between you

The Mail section shows a list of recent emails.

14.2.6 Attachments

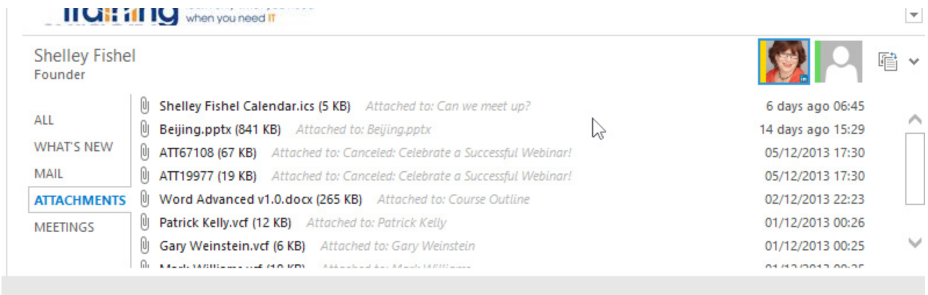


Figure 198 – see a list of email with attachments

Find a list of emails with attachments from this contact here.

14.2.7 Meetings

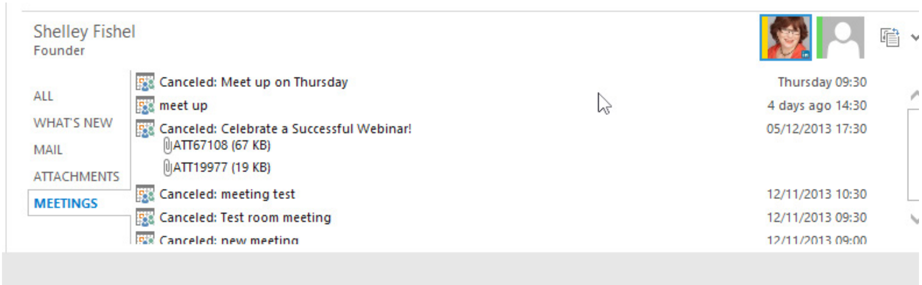


Figure 199 – see a list of meetings with this person

A list of meetings with this contact are shown here.

15 Tasks and to do

15.1 To do

When entering the Task Module there are two items listed in the Navigation Pane. One is the to-do list and one is the task list. So what is the difference between the two?

To-do list – this is a master list which includes all tasks that have been created as tasks and also any item that has been flagged.
Task List – this includes only tasks and will not show any flagged items.

The To-Do List is in fact a search folder that includes all flagged items and tasks and is always up to date.

15.1.1 The to-do list

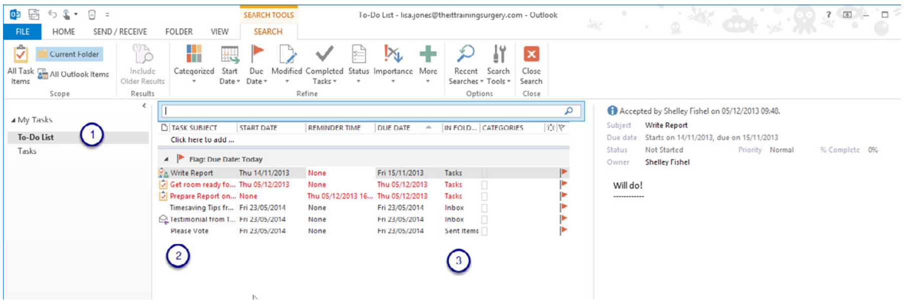


Figure 200 – the to-do list

1. In the Navigation Pane click To-Do List
2. See a list of all the flagged items plus any tasks that you have created
3. Display the In Folder column to see where each item is stored.

15.1.2 Flag an item to add to the to-do list

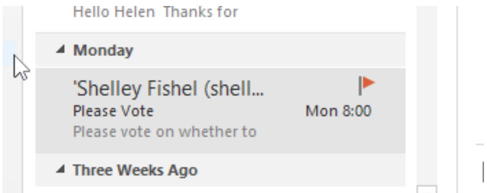


Figure 201 – flag an item

When you flag an item and/or set a reminder, it is added to the To-Do list.

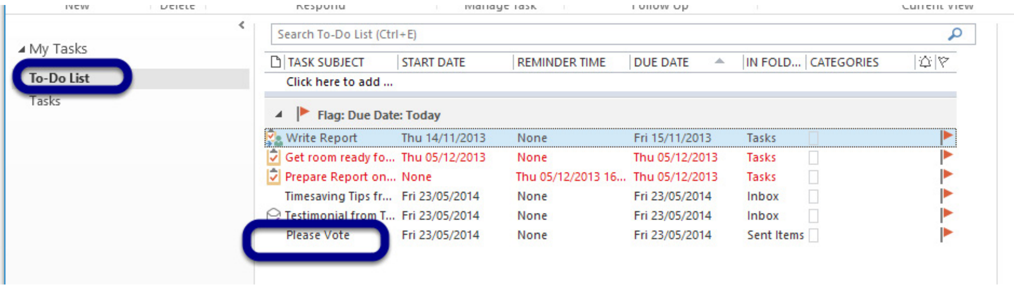


Figure 202 – see it on the to-do list

Here it is!

15.2 Tasks

New tasks can be created in several ways.

- Click New Task in the Task Module
- Type in the Click here to add new task row at the top of the To-Do list.
- Drag a calendar appointment on to the Task shortcut
- Drag an email onto the Task shortcut

15.2.1 New task

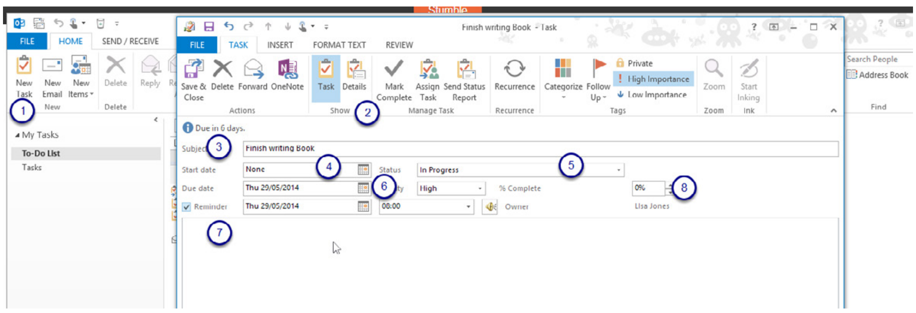


Figure 203 – create a new task

1. In the Task module click New Task
2. Complete the details – note that each task has two views, Task and Details.
3. Type a subject
4. Set a start date
5. Complete the status
6. Set a due date – tasks will show on the calendar on the due date – when viewed in Day, Work Week or Week View
7. If you want a reminder – tick the box and set the time
8. Set the percentage complete

15.2.2 Details view

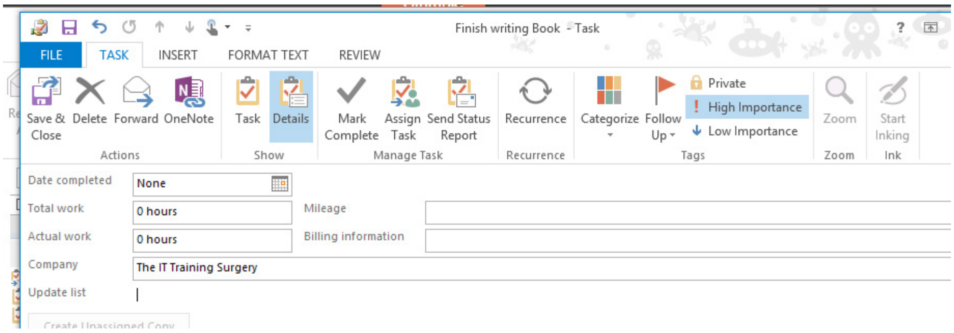


Figure 204 – see more details

Here you can add more information – if you travel this is a good place to note mileage.

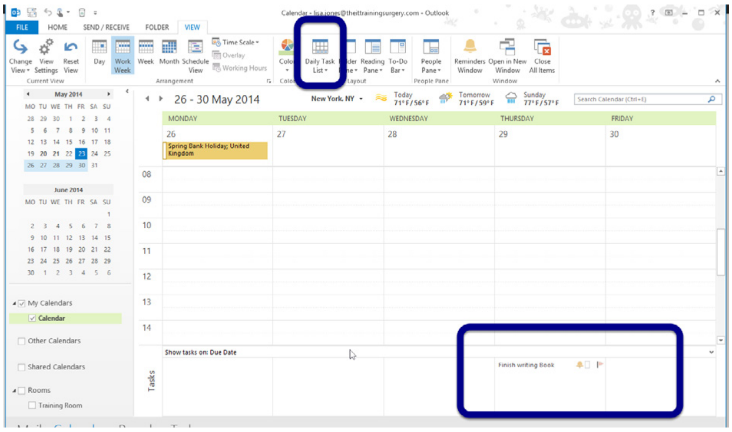


Figure 205 – more information can be added here

On the Calendar the task is displayed in the Daily Task List view which can be shown at the bottom of the Day, Work Week or Week view.

15.3 Create a task from an email

You just received an email from a colleague or your boss asking you to take action on a project. Rather than create a task from scratch you can drag the email onto the Task Icon to create a new task which includes all the relevant information.

15.3.1 Drag to the Task Icon

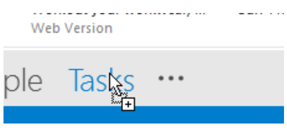


Figure 206 – drag an email to task icon

1. Drag the email and drop it on the Tasks shortcut

15.3.2 New task created

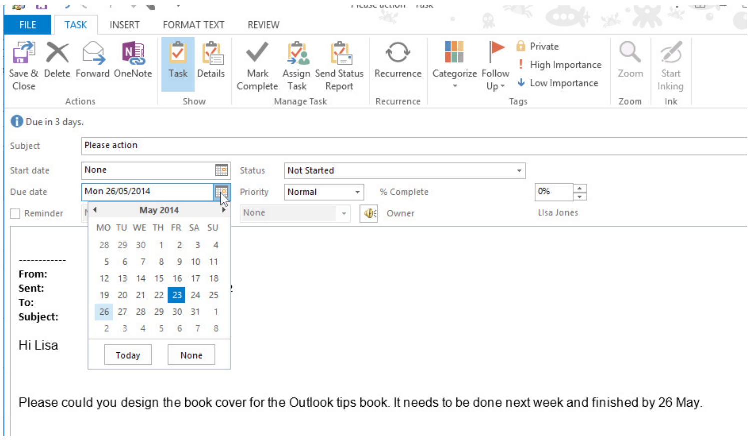


Figure 207 – new task is created

A new task is created with the subject from the email. All you need to do is fill in the start/due date and any more details.

2. Click Save & Close

15.3.3 Task appears in to do list

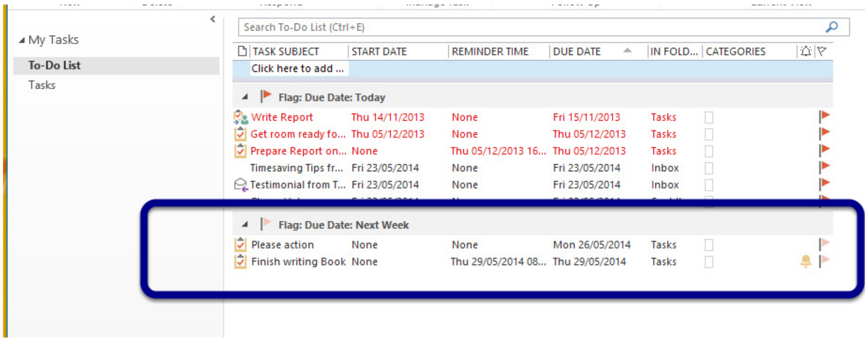


Figure 208 – task appears on the to do list

The new task appears on the To-Do list flagged for Due Date.

15.3.4 Task appears in the task list

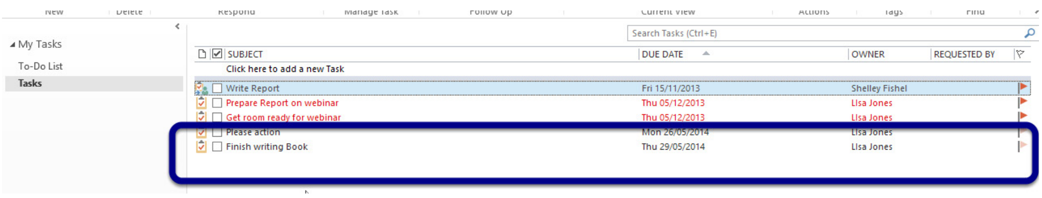
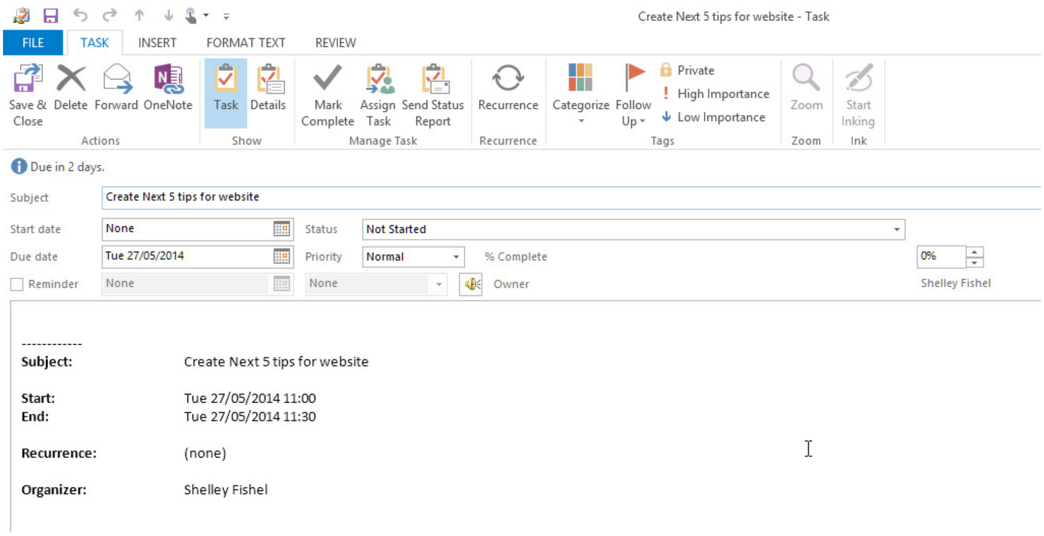


Figure 209 – task appeas on the task list

The new task appears in the task list as well – without any other flagged items.

15.4 Create a task from an appointment

Drag a calendar appointment to the Tasks Icon and when you let go a new task will be created.



Appointment to task

Figure 210- drag an appointment on to the task icon

Complete the fields for start/due date and status, set a reminder if you want one and click Save and Close.

The new task will appear in the task list and the to do list as before.

16 Mail merge

16.1 Mail merge

Outlook 2013 uses the Microsoft Word 2013 mail merge engine to produce mail merged emails. You can start a Mail Merge from within Microsoft Word 2013 or from Microsoft Outlook 2013.

Here are the steps to send one personalised email to many of your Outlook Contacts.

16.1.1 Select the Contacts

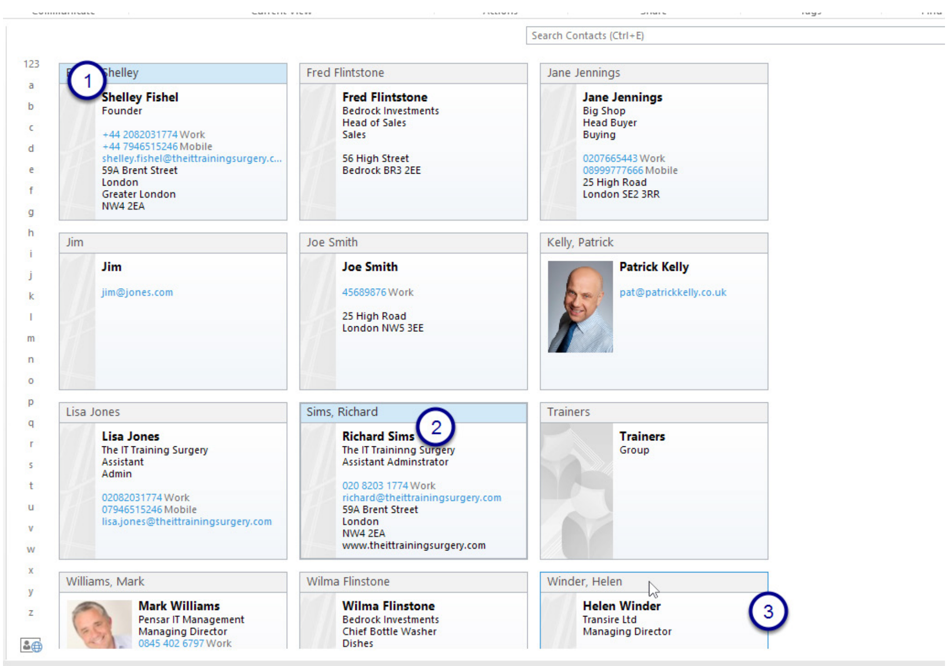


Figure 211 – choose who to write to

Click on each Contact to include in the merge – if they are next to each other, hold down the Shift key. If they are not next to each other, hold down the Control key as you click.

16.1.2 Click mail merge

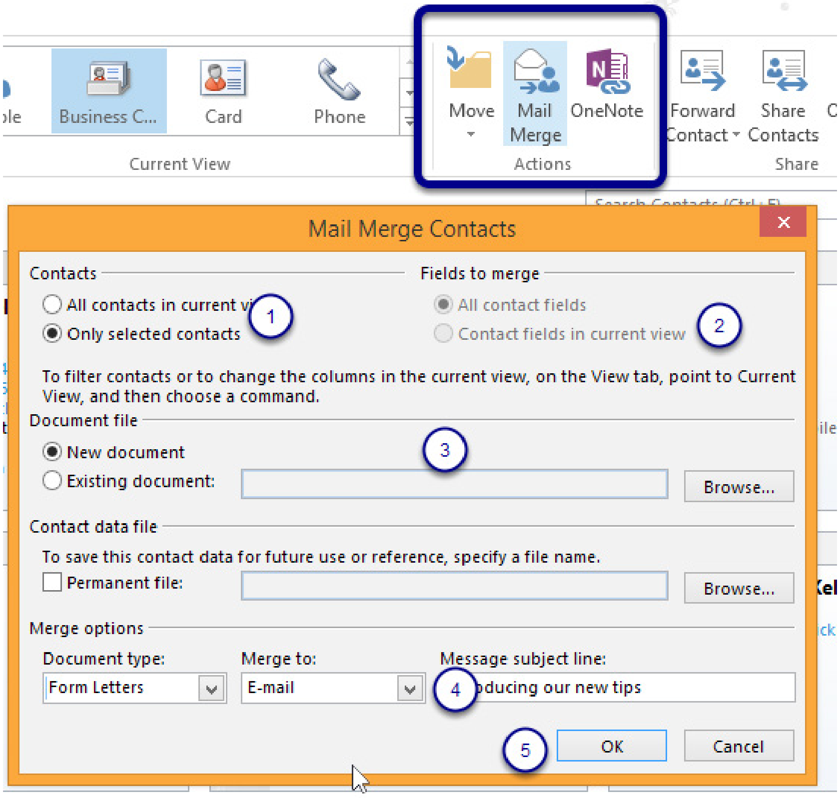


Figure 212 – start the merge

Click Mail Merge on the main Home Ribbon.

1. Select whether to use all contacts in the current view or only the selected contacts
2. Choose which fields to include – this allows you to pick individual fields to personalise the messages
3. Decide if you are creating a brand new message or using an existing document
4. Choose E-mail in Merge to – this tells Outlook that you are creating an email rather than a document
5. Type a subject line for the message
6. Click OK

16.1.3 Outlook now initialises Word

Outlook now opens up Microsoft Word which is where you will create the message and complete the merge process.

16.2 Create the message

Now that you are in Word, you will see the Mail Merge Ribbon with the options to complete the merge process.

16.2.1 Word Mail Merge Ribbon

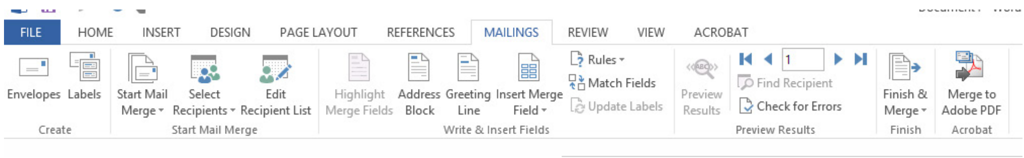


Figure 213 – create the message in Word

The steps for a Mail Merge follow the direction of the Ribbon and move from left to right.

You have already set the subject line, and selected the recipients (you did that in Outlook), now you need to address the message to each individual and add any text. Then you can check how it will look before completing the merge.

16.2.2 Mail merge fields

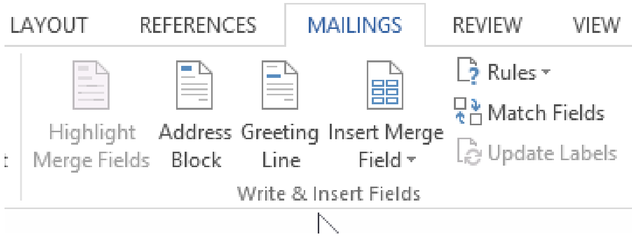


Figure 214 – add mail merge fields

Address Block – this inserts a whole finished Address Block – not necessary when sending an email merge.
Greeting Line – you can choose from a selection of pre-set greeting lines.
Insert Merge Field – this option gives you the greatest flexibility when building a personalised email or letter. You can pick exactly which field you want to use.

16.2.3 Insert Merge Field

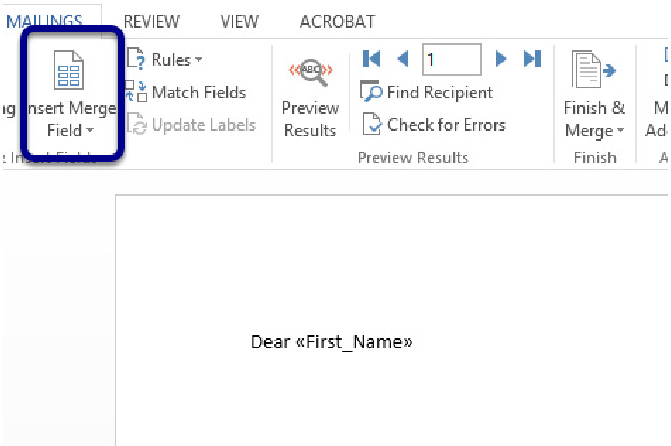


Figure 215 – add individual fields

Type the greeting or heading you want to use and then select the field from the Insert Merge Field list – I chose First_Name.

16.2.4 Preview the result

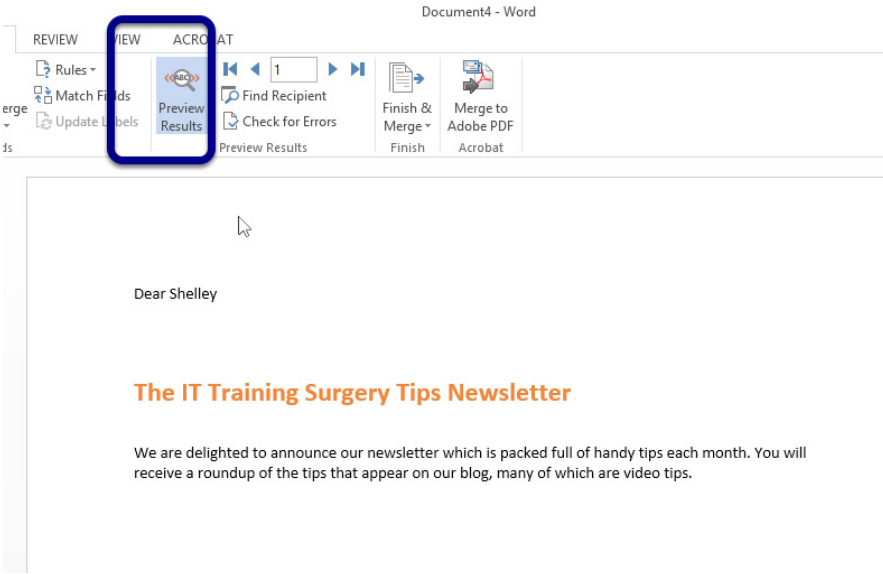


Figure 216 – see what it looks like

Click on Preview Results to see what your customised email will look like. Use the arrows to move between records so that you can check each one.

16.2.5 Finish and merge

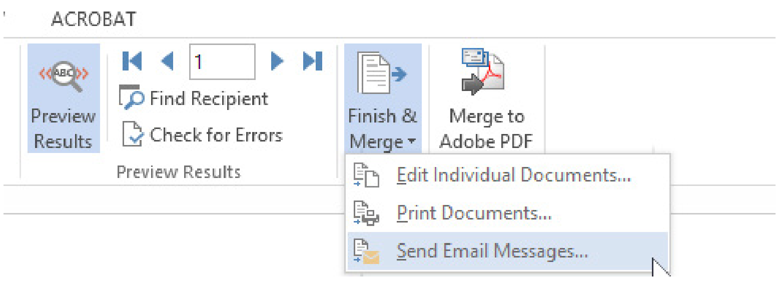


Figure 217 – finsish the merge

When you are absolutely happy with the message, click the drop down under Finish and Merge and select Send Email Messages.

16.2.6 Confirm the merge

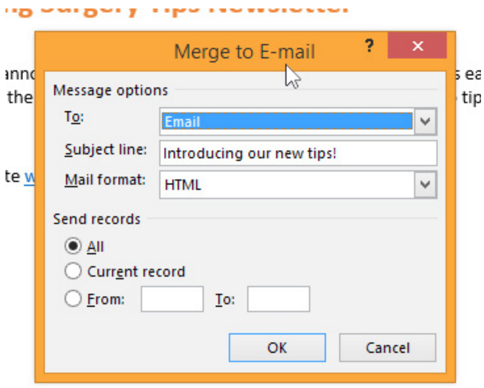


Figure 218 – confirm you want to send

Check the dialogue box – you can change the subject line if you want to here. Click OK to send the email merge.

16.2.7 See the sent messages

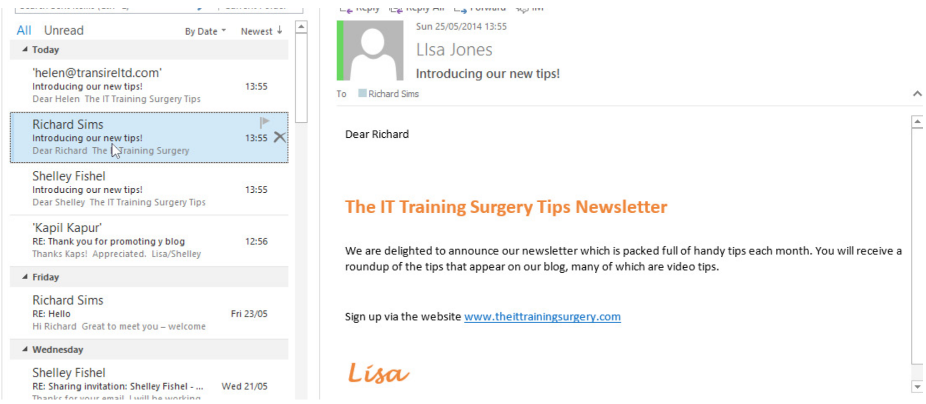


Figure 219 – merged messages appear in the sent items folder

The messages are sent immediately – to see them, go to the Sent Items folder in Outlook and there they are!

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